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Kent Downs
Area of Outstanding Natural Beauty

Economic Impact of Tourism

Kent Downs AONB - 2019

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Total number of trips (day & staying)
9,008,200

Total staying trips
618,200

UK staying trips
494,000

Overseas staying trips
124,300

Total staying nights
3,392,000

UK staying nights
2,472,000

Overseas staying nights
920,000

Total staying spend
£151,252,000

UK staying spend
112,269,000

Overseas staying spend
38,983,000

Total day trips
8,390,000

Total day trip spend
£217,913,000

Associated spend
£7,546,000

Includes maintenance spending on second homes, boats and static vans as well as additional household spending due to people coming to stay with them.

Total visitor spend
£353,218,000

Adjustments made to avoid double-counting (e.g. spending on retail and catering at attractions or accommodation, or travel spend taking at the origin of the trip.

Indirect / induced spend
£94,167,000

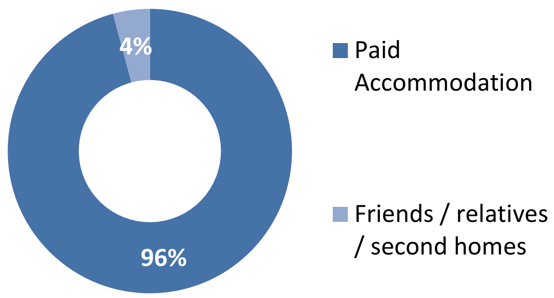
Total Tourism Value
£447,385,000

Full time equivalent jobs
7,037

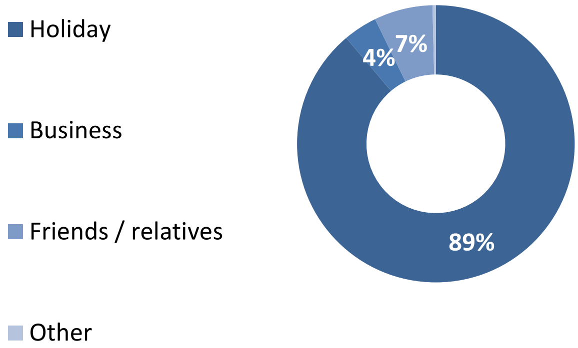
Total actual tourism related employment
9,770

	2019
Average length stay (nights x trip)	5.49
Spend x overnight trip	£244.63
Spend x night	£44.59
Spend x day trip	£25.97

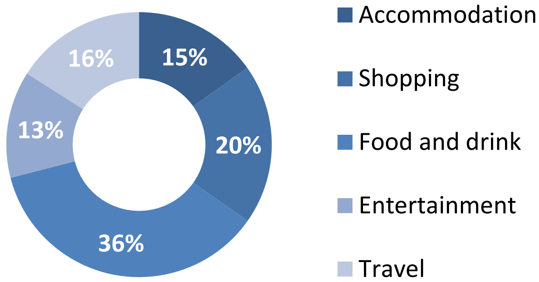
Type of Accommodation



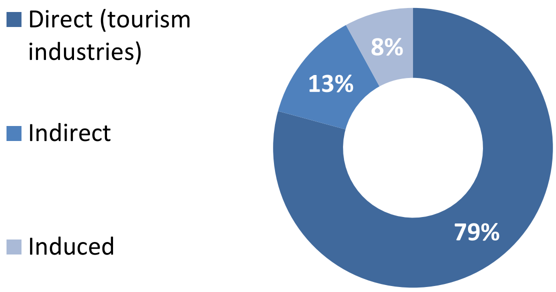
Trips by Purpose



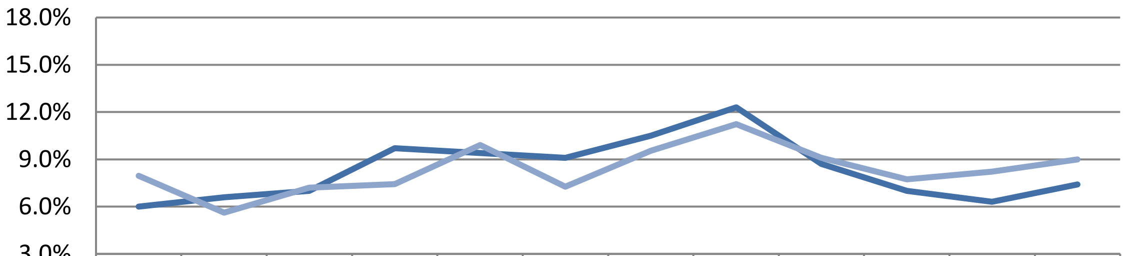
Breakdown of expenditure



Type of employment

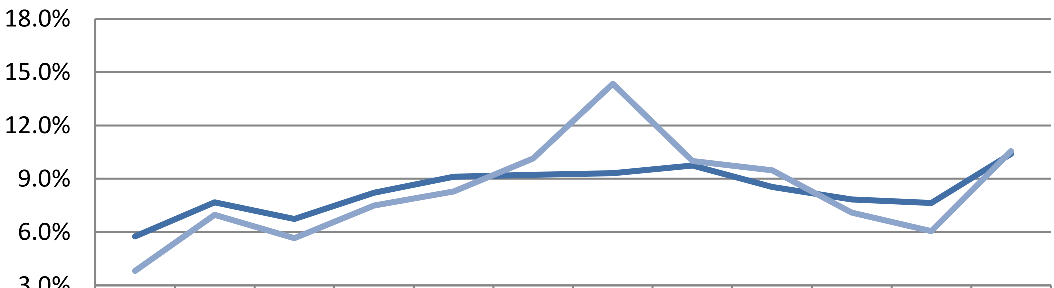


Seasonality - Day visitors (East of England)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	6.0%	6.6%	7.0%	9.7%	9.4%	9.1%	10.5%	12.3%	8.7%	7.0%	6.3%	7.4%
Day spend	7.9%	5.6%	7.2%	7.4%	9.9%	7.3%	9.5%	11.2%	9.1%	7.7%	8.2%	9.0%

Seasonality - Overnight visitors (East of England)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	5.8%	7.7%	6.7%	8.2%	9.1%	9.2%	9.3%	9.7%	8.5%	7.8%	7.6%	10.4%
Overnight spend	3.8%	7.0%	5.7%	7.5%	8.3%	10.1%	14.3%	10.0%	9.5%	7.1%	6.1%	10.6%

Contextual analysis

Domestic tourism

In 2019, British residents took 99.7 million overnight trips in England (down from 100.6 million overnight trips in 2017), totalling 290 million nights away from home (down from 299 million nights in 2017). Expenditure reached £19.40 billion (up from £19.05 billion in 2017). The spend per trip was £194.58 and with an average trip length of stay of 2.9 nights, the average spend per night was £66.89.

The South East region experienced a -3% decrease in overnight trips between 2017 and 2019. Bednights were down -2% on 2017 and expenditure was unchanged since 2017. The region received slightly less visitors in 2019 than in 2017 but visitors spent slightly more per night than in 2017. The average spend per trip was £161.37 and with an average length of stay of 2.66 nights, the average spend per night was £60.56.

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 2019 are an average of 2017, 2018 and 2019.

Domestic tourism - Kent Downs AONB in the County context

The domestic tourism results for Kent County show a total 3.7 million overnight trips taken by British residents, totalling 10.7 million nights away from home. Expenditure reached £560 million.

The Kent Downs AONB attracted 494,000 overnight visitors (13% of all trips to Kent) and 2.5 million nights away from home (23% of all nights away from home in Kent). Expenditure reached £112 million (20% of all of Kent's associated trip expenditure).

The length of stay for overnight trips to the Kent Downs AONB averages 5.0 nights (compared to 2.9 nights to Kent as a whole). The main reason for this difference is the type of accommodation used by visitors. The Kent Downs AONB has a proportionally higher percentage of self-catering accommodation (cottages, caravan and camping, etc), which generates longer stays compared to services accommodation (hotels, B&Bs, etc.), which is more prominent in the main build up areas within Kent and outside the AONB.

Visits from overseas

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 highlight longer-term trends, whilst helping smooth out short-term market fluctuations and reducing the impact of any methodological changes affecting the survey. As such, county and district level results relating to 2019 are an average of 2017, 2018 and 2019 results.

At national level, the number of visits in 2019 was 36.1 million (33.0 in 2017). The number of visitor nights spent in England was 252.4 million (245.7 million in 2017), with the average number of nights per visit standing at 7.99 in 2019 (from 7.45 in 2017). Expenditure in 2019 was £24.78 billion, slightly below the £24.94 billion achieved in 2017.

Overseas trips to the South England region were down by 1% compared to 2017 at 5.4 million overnight trips. The total number of nights was 36.8 million, down slightly from the 37.4 million nights in 2017. Expenditure in 2019 was £2.58 billion, up 11% from 2.32 billion in 2017.

The International Passenger Survey is conducted by the 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 2019 was 25,147.

Visits from overseas - **Kent Downs AONB in the County context**

The overseas tourism results for Kent County show a total 1.1 million overnight trips taken by overseas residents, totalling 6.5 million nights away from home. Expenditure reached £340 million.

The Kent Downs AONB attracted 124,300 overnight visitors (11% of all overseas trips to Kent) and 921 thousand nights away from home (14% of all nights away from home in Kent). Expenditure reached £39 million (11% of all of Kent’s associated trip expenditure).

As it was the case with domestic overnight trips, due to the nature of the accommodation stock available within the AONB, the length of stay for overnight trips to the Kent Downs AONB averages 7.4 nights (compared to 5.7 nights to Kent as a whole).

Day visits

During 2019, UK residents took a total of 1,390 million Tourism Day Visits in England (down from 1,505 in 2017). Around £56.5 billion were spent during these trips, up from £50.9 billion in 2017.

The volume and value of tourism day visits in the South East of England decreased by 5% between 2017 and 2019, from 230 million down to 218 million. Expenditure levels were up by 7% to £7.9 billion in 2019.

Day visits - Kent Downs AONB in the County context

During 2019, UK residents took a total of 61.7 million Tourism Day Visits in Kent. Of these, 17.2 million trips were to countryside areas. Around £2.2 billion were spent during these trips (£451 million spent in rural areas).

The Kent Downs AONB attracted 8.4 million day trips, expenditure. This equates to just under 14% or all day trips to Kent and 49% of all trips to the Kent's countryside. Day trips to the Kent Downs AONB generated £218 million (10% of all of Kent's associated trip expenditure and 35% of the county's spend in rural areas).

About Kent Downs AONB Results

The results presented in this report were generated using a bespoke Cambridge Model template designed to cover the Kent Downs AONB area.

We first identified the districts within Kent included within the Kent Downs AONB area. Then we used district level data already published in order to estimate the volume of visits (day trips and overnights stays) and the direct expenditure from visits to these districts.

The next step was to identify the proportion of each district (geographical area and population) included within the AONB as well as other drivers such as known local accommodation stock, visitor attraction performance data and other visitor survey related information. This allowed us to estimate the volume of visits and the direct expenditure within the Kent Downs AONB.

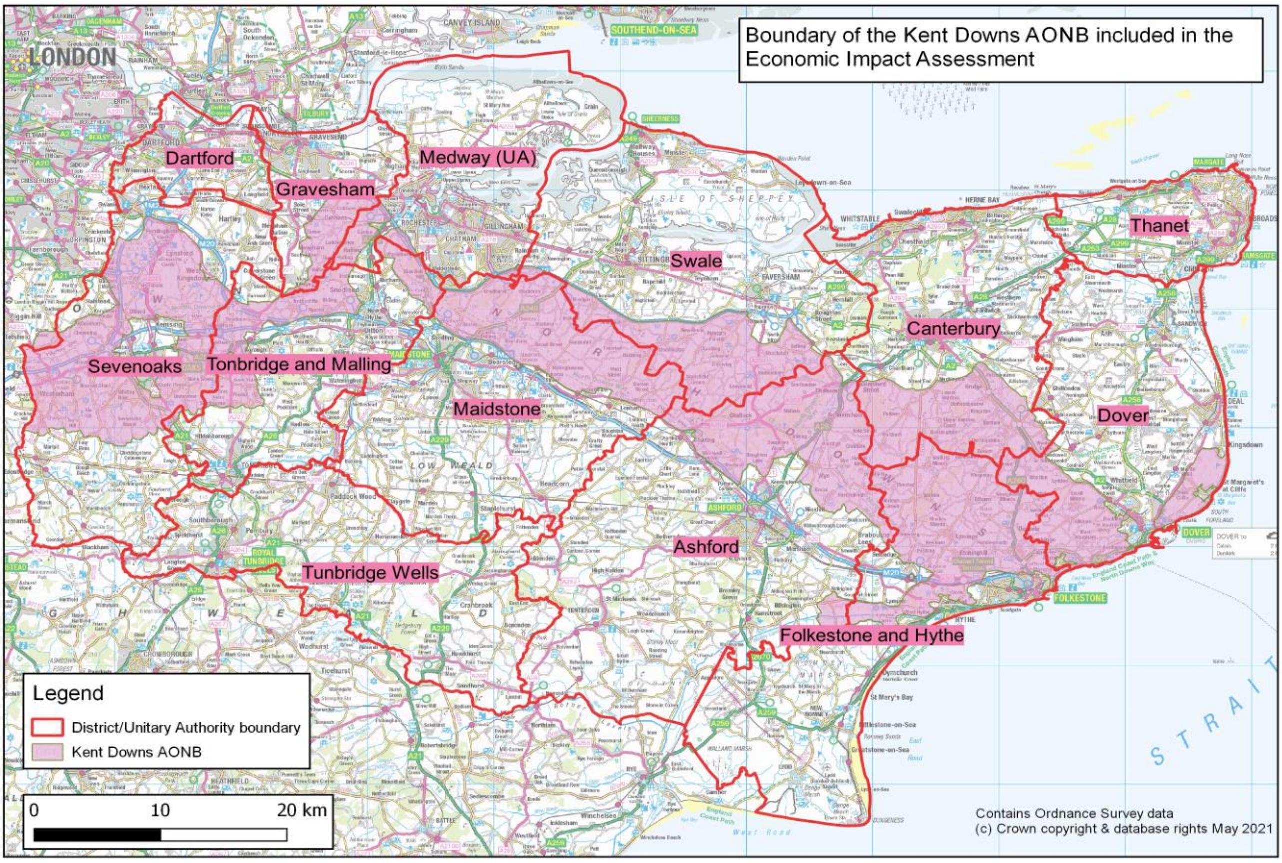
Finally, we used the model's multipliers for indirect and income induced impacts to arrive at the total value and employment figures.

We have included more information about local data used to build the data template for the Kent Downs AONB on the following page. For more details about the Cambridge Model methodology, please see Appendix I.

About Kent Downs AONB Results

District	Area (sqkm)	Area within AONB (Sqkm)	Percentage within AONB
Sevenoaks	370	166	45%
Folkestone & Hythe	357	134	37%
Canterbury	309	86	28%
Maidstone	393	107	27%
Gravesham	99	24	24%
Swale	373	86	23%
Dover	315	71	22%
Ashford	581	124	21%
Tonbridge&Malling	240	64	19%
Medway	194	14	7%

District	Population	Population within AONB	Percentage within AONB
Folkestone&Hythe	112,996	18,122	16%
Sevenoaks	120,750	19,299	16%
Ashford	130,032	7,394	6%
Tonbridge&Malling	132,153	7,012	5%
Canterbury	165,394	5,454	3%
Swale	150,082	4,732	3%
Maidstone	171,826	5,361	3%
Gravesham	106,939	2,732	3%
Dover	118,131	2,982	3%



Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	96,700	20%	34,000	27%	130,700	21%
Self catering	97,600	20%	38,000	31%	135,600	22%
Camping	187,100	38%	23,000	19%	210,100	34%
Static caravans	77,900	16%	6,800	5%	84,700	14%
Second homes	3,600	1%	300	0%	3,900	1%
Boat moorings	100	0%	0	0%	100	0%
Other	2,400	0%	3,100	2%	5,500	1%
Friends & relatives	28,600	6%	19,100	15%	47,700	8%
Total	**494,000**		**124,300**		**618,300**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	191,000	8%	155,000	17%	346,000	10%
Self catering	535,000	22%	282,000	31%	817,000	24%
Camping	1,341,000	54%	165,000	18%	1,506,000	44%
Static caravans	316,000	13%	27,000	3%	343,000	10%
Second homes	11,000	0%	2,000	0%	13,000	0%
Boat moorings	1,000	0%	0	0%	1,000	0%
Other	11,000	0%	11,000	1%	22,000	1%
Friends & relatives	66,000	3%	278,000	30%	344,000	10%
Total	**2,472,000**		**920,000**		**3,392,000**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£19,657,000	18%	£13,178,000	34%	£32,835,000	22%
Self catering	£36,834,000	33%	£12,505,000	32%	£49,339,000	33%
Camping	£41,329,000	37%	£5,240,000	13%	£46,569,000	31%
Static caravans	£11,000,000	10%	£687,000	2%	£11,687,000	8%
Second homes	£571,000	1%	£21,000	0%	£592,000	0%
Boat moorings	£19,000	0%	£0	0%	£19,000	0%
Other	£563,000	1%	£132,000	0%	£695,000	0%
Friends & relatives	£2,296,000	2%	£7,220,000	19%	£9,516,000	6%
Total	**£112,269,000**		**£38,983,000**		**£151,252,000**	

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	442,600	90%	106,500	86%	549,100	89%
Business	14,400	3%	10,100	8%	24,500	4%
Friends & relatives	35,200	7%	7,000	6%	42,200	7%
Other	1,700	0%	700	1%	2,400	0%
Study	0	0%	0	0%	0	0%
Total	**493,900**		**124,300**		**618,200**	

Nights by Purpose

	UK		Overseas		Total	
Holiday	2,279,000	92%	774,000	84%	3,053,000	90%
Business	60,000	2%	53,000	6%	113,000	3%
Friends & relatives	126,000	5%	84,000	9%	210,000	6%
Other	6,000	0%	10,000	1%	16,000	0%
Total	**2,471,000**		**921,000**		**3,392,000**	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£105,230,000	94%	£34,038,000	87%	£139,268,000	92%
Business	£4,502,000	4%	£2,037,000	5%	£6,539,000	4%
Friends & relatives	£1,870,000	2%	£2,412,000	6%	£4,282,000	3%
Other	£667,000	1%	£496,000	1%	£1,163,000	1%
Total	**£112,269,000**		**£38,983,000**		**£151,252,000**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

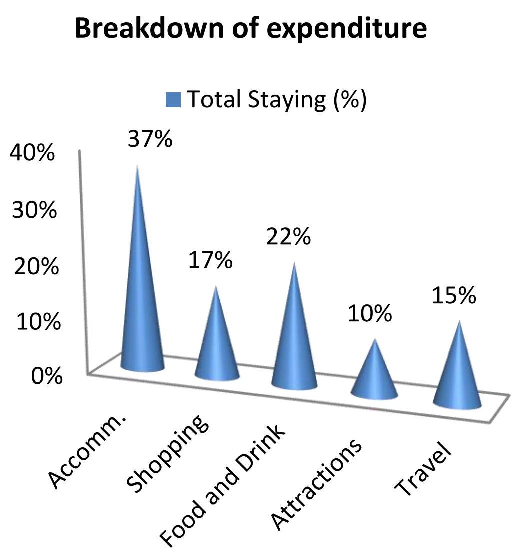
	Trips	Spend
Urban visits	839,000	£32,639,000
Countryside visits	6,546,000	£156,267,000
Coastal visits	1,005,000	£29,007,000
Total	**8,390,000**	**£217,913,000**

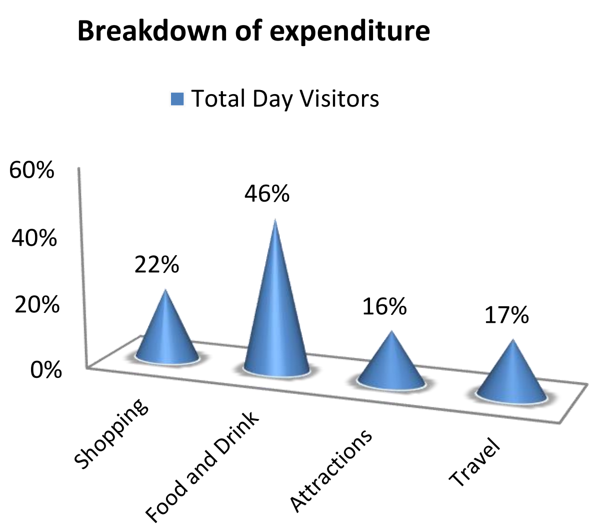
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£42,814,000	£14,365,000	£24,563,000	£12,268,000	£18,259,000	£112,269,000
Overseas tourists	£12,978,000	£10,674,000	£8,756,000	£2,799,000	£3,777,000	£38,984,000
Total Staying	£55,792,000	£25,039,000	£33,319,000	£15,067,000	£22,036,000	£151,253,000
Total Staying (%)	37%	17%	22%	10%	15%	100%
Total Day Visitors	£0	£46,973,000	£99,856,000	£34,350,000	£36,755,000	£217,934,000
Total Day Visitors	0%	22%	46%	16%	17%	100%
Total	**£55,792,000**	**£72,012,000**	**£133,175,000**	**£49,417,000**	**£58,791,000**	**£369,187,000**
%	**15%**	**20%**	**36%**	**13%**	**16%**	**100%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£468,000	£267,000	£58,000	£6,753,000	£7,546,000

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

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	£56,458,000	£1,997,000	£58,455,000
Retail	£24,788,000	£46,504,000	£71,292,000
Catering	£32,320,000	£96,861,000	£129,181,000
Attractions	£15,651,000	£35,819,000	£51,470,000
Transport	£13,221,000	£22,053,000	£35,274,000
Non-trip spend	£7,546,000	£0	£7,546,000
Total Direct	**£149,984,000**	**£203,234,000**	**£353,218,000**

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	£28,101,000	£30,012,000	£58,113,000
Non trip spending	£1,509,000	£0	£1,509,000
Income induced	£15,767,000	£18,778,000	£34,545,000
Total	**£45,377,000**	**£48,790,000**	**£94,167,000**

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	£149,984,000	£203,234,000	£353,218,000
Indirect	£45,377,000	£48,790,000	£94,167,000
Total Value	**£195,361,000**	**£252,024,000**	**£447,385,000**

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	1,070	45%	38	1%	1,108	21%
Retailing	267	11%	501	17%	768	15%
Catering	582	25%	1,745	60%	2,327	44%
Entertainment	188	8%	430	15%	618	12%
Transport	124	5%	208	7%	332	6%
Non-trip spend	140	6%	0	0%	140	3%
Total FTE	**2,372**		**2,922**		**5,293**	

Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	1,584	46%	56	1%	1,640	21%
Retailing	401	12%	752	17%	1,152	15%
Catering	873	25%	2,618	61%	3,491	45%
Entertainment	265	8%	606	14%	871	11%
Transport	175	5%	293	7%	468	6%
Non-trip spend	159	5%	0	0%	159	2%
Total Actual	**3,457**		**4,324**		**7,782**	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	548	556	1,104
Induced jobs	292	348	640
Total FTE	**840**	**904**	**1,744**

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	625	634	1,259
Induced jobs	333	396	729
Total Actual	**958**	**1,030**	**1,988**

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	2,372	74%	2,922	76%	5,293	75%
Indirect	548	17%	556	15%	1,104	16%
Induced	292	9%	348	9%	640	9%
Total FTE	**3,212**		**3,825**		**7,037**	

Estimated actual jobs						
	Staying Visitor		**Day Visitor**		**Total**	
Direct	3,457	78%	4,324	81%	7,782	80%
Indirect	625	14%	634	12%	1,259	13%
Induced	333	8%	396	7%	729	7%
Total Actual	**4,415**		**5,354**		**9,770**	

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.

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