



destination**research**  
delivering results : measuring what matters



Produced by:

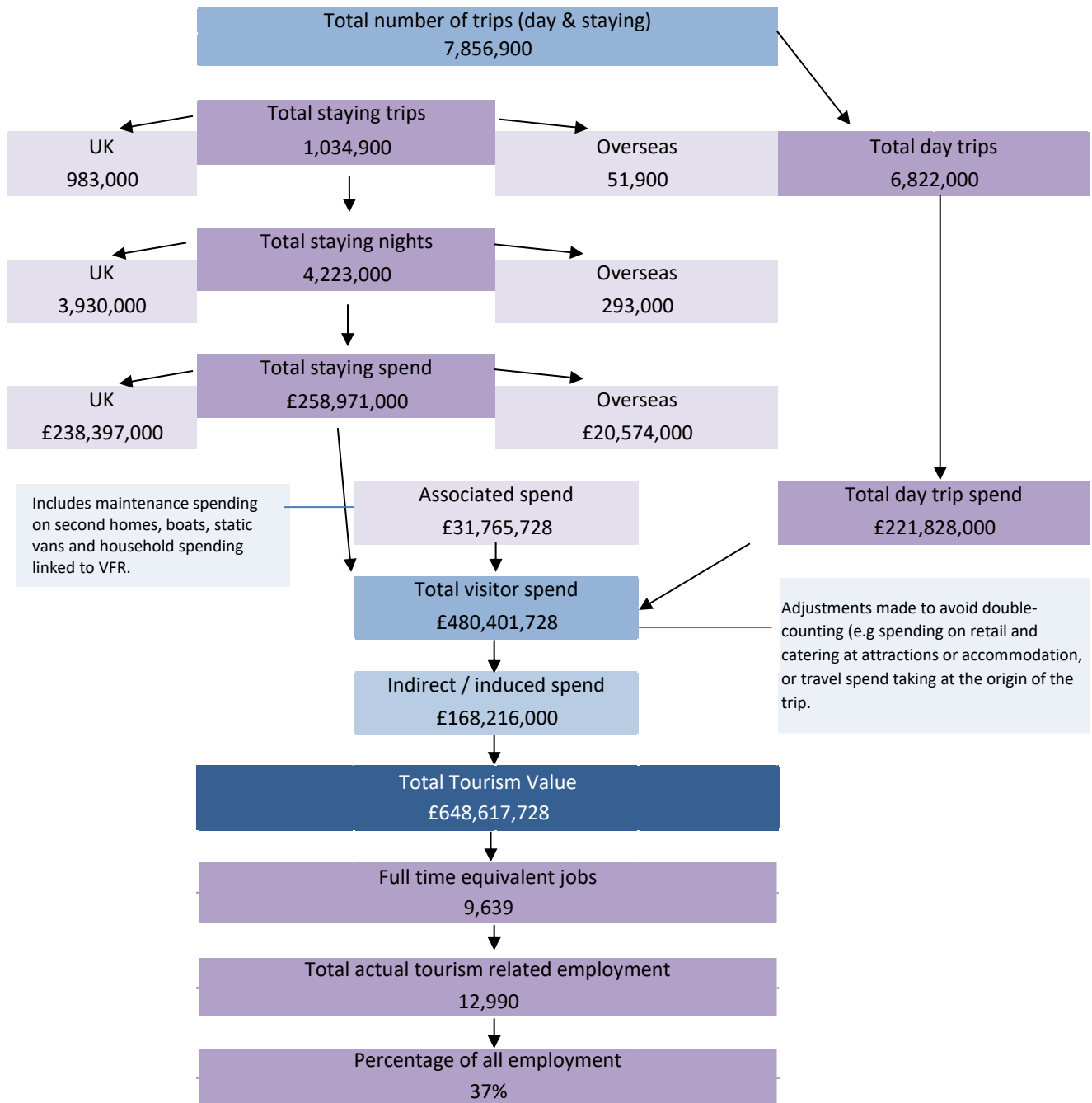
Destination Research  
Sergi Jarques, Director

Economic Impact of Tourism  
Great Yarmouth & Surrounding Area - 2019



## Economic Impact of Tourism – Headline Figures

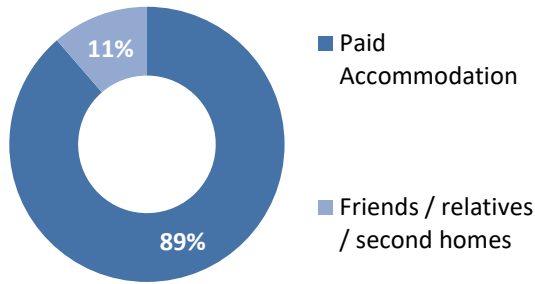
## Great Yarmouth & Surrounding Area



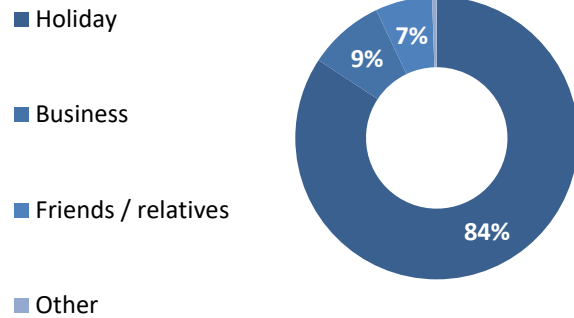
### Economic Impact of Tourism – Year on year comparisons

	2019
<b>Day Trips</b>	
Day trips Volume	6,822,000
Day trips Value	£221,828,000
<b>Staying trips</b>	
Number of trips	1,034,900
Number of nights	4,223,000
Trip value	£258,971,000
<b>Total Value</b>	<b>£648,617,728</b>
<b>Actual Jobs</b>	12,990

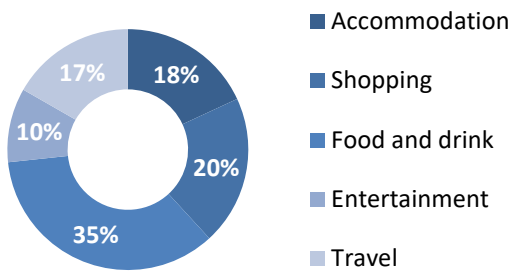
### Type of Accommodation



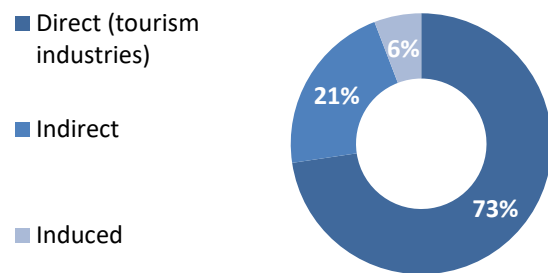
### Trips by Purpose



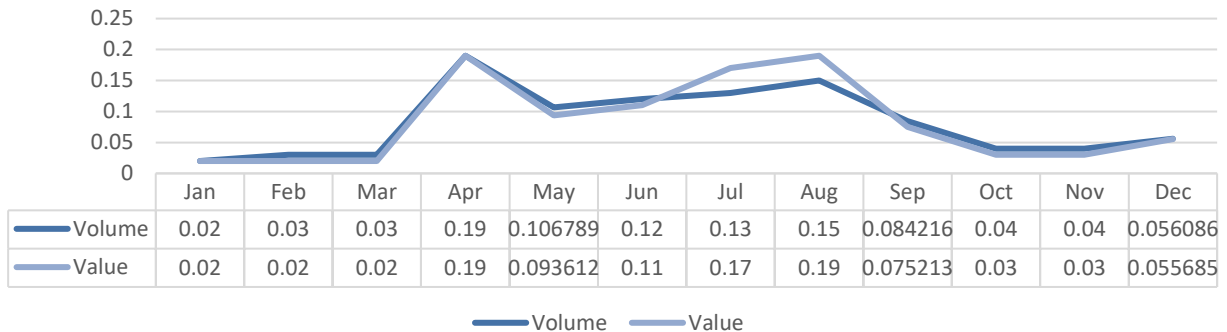
### Breakdown of expenditure



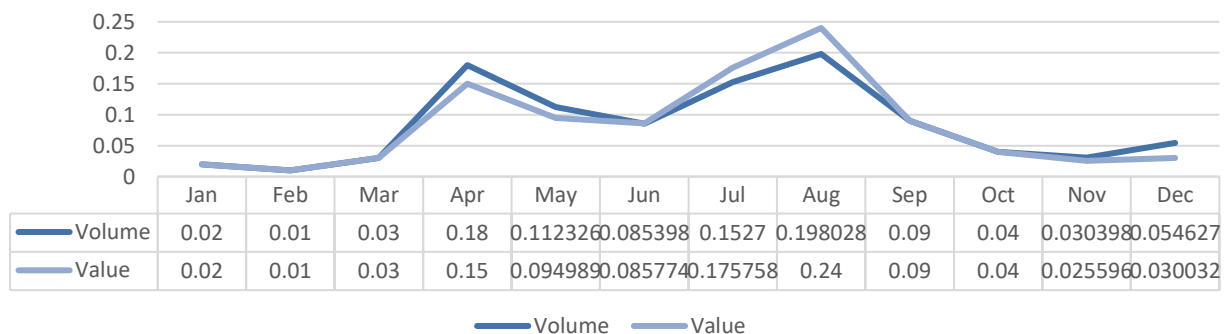
### Type of employment



### Seasonality - Day trips



### Seasonality - Overnight trips



## **INTRODUCTION**

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2019 and provides comparative data against previously published data. The results are derived using the Cambridge Economic Impact Model under licence by Destination Research Ltd based on the latest data from national tourism surveys and regionally/locally based data.

## **CONTEXTUAL ANALYSIS**

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

### **Domestic tourism**

#### **National Performance**

In 2019, British residents took 99.7 million overnight trips in England, totalling 290 million nights away from home and expenditure of £19.4 billion, with an average trip length of 2.9 nights. England saw an overall increase in trips compared to 2018 of +1.7%. Holiday Trips in England in 2019 increased by 2.6% compared to 2018, with 46.4 million trips recorded.

#### **Regional performance**

The East of England region experienced a 11% increase in overnight trips during 2019 (following a 12% drop the previous year). Bednights were also up, by 12% on 2018 (after an 8% drop the previous year) and expenditure was up by 6% (following an 8% drop in value the previous year).

The average expenditure per night in 2019 was £52.8 (from £55.9 in 2018) and the spend per trip was £170.9 (up from £179.5 in 2018). The region received more visitors in 2019 than in the previous year. Their length of stay of these trips was unchanged from 2018 but they spend less during their visit, compared average expenditure levels in 2018.

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 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.

## **Visits from overseas**

### **National Performance**

The number of visits in 2019 reached 40.9 million, up from 40.3 million in 2018. The value of spending increased by 14%, from £26.5 billion in 2018 to £28.4 billion in 2019. Average spend per visit was £696 in 2019, up from £658 the previous year. The number of visitor nights spent in the UK was almost on 2018 (290 million nights in 2019 and 291 million nights in 2018), with the average number of nights per visit declining slightly to 7.1 in 2019 (from 7.2 the previous year).

### **Regional performance**

The number of overseas trips to the East of England in 2019 was unchanged year-on-year, at 2.27 million trips (down on 2.4 million overnight trips in 2017). The total number of nights was up by 12% to 16.4 million nights (following a 14% drop the previous year). Spend was up to 36% to £1.02 billion, (following a 14% drop the previous year).

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.

## **Tourism Day Visits**

### **National Performance**

During 2019, UK residents took a total of 1,653 million Tourism Day Visits (down from 1,703 in 2018). Around £67 billion was spent during these trips, about 4.8% up on 2018. The largest proportion of visits were taken to destinations in England (1,390 million visits or 84% of the total). The distribution of expenditure during visits reflects this pattern, with a total value of day trips to England totalling £56.5 billion (84% of the total for GB).

### **Regional performance**

During 2019, the volume tourism day visits in the East of England decreased by 10.5% to 123 million (following a 3% increase the previous year). Spend was also down by 7% to £4.7 billion (after a 31% increase the previous year).

The Day Visitor Survey (GBDVS) data is also a key driver for the Cambridge model. 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.

## GREAT YARMOUTH - TOWN LEVEL DATA

This report examines the volume and value of tourism and the impact of visitor expenditure on the Great Yarmouth Borough and splits the results into five parish areas. The table below lists the parishes that have been included in each of the 5 town areas.

Northern Area	North East Area	North West Area	Great Yarmouth	Southern Area
California	Caister-on-Sea	Ashby with Oby	Great Yarmouth	Belton with Browston
Hemsby	West Caister	Clippesby		Bradwell
Newport		Filby		Burgh Castle
Ormesby St. Margaret		Fleggburgh		Fritton and St. Olaves
Scratby		Martham		Gorleston
Somerton		Mautby		Hopton-on-Sea
Winterton-on-Sea		Ormesby St. Michael		
		Repps with Bastwick		
		Rollesby		
		Stokesby with Herringby		
		Thurne		

The town level results are based on detailed analysis of the parishes that fall into each of the five areas. We have used data relating to population and number of households as well as accommodation stock levels falling under each of the five areas. The data has been obtained using external sources such as the Office for National Statistics as well as a tourism accommodation audit completed as part of a wider research project.

## Comparative data

### Volume of Trips and Related Expenditure

### Great Yarmouth & Surrounding Area - 2019

<b>Overnight visits</b>	<b>Northern Area</b>	<b>North East Area</b>	<b>North West Area</b>	<b>Great Yarmouth</b>	<b>Southern Area</b>	<b>Great Yarmouth Borough</b>
UK trips	231,000	105,000	92,000	389,000	165,000	982,000
Overseas trips	5,000	3,000	3,800	32,400	8,200	52,400
<b>Total trips</b>	<b>236,000</b>	<b>108,000</b>	<b>95,800</b>	<b>421,400</b>	<b>173,200</b>	<b>1,034,400</b>

UK nights	1,021,000	485,000	374,000	1,325,000	727,000	3,932,000
Overseas nights	53,000	17,000	29,000	149,000	46,000	294,000
<b>total nights</b>	<b>1,074,000</b>	<b>502,000</b>	<b>403,000</b>	<b>1,474,000</b>	<b>773,000</b>	<b>4,226,000</b>

UK spend	£55,776,000	£24,399,000	£23,644,000	£97,996,000	£36,615,000	£238,430,000
Overseas spend	£3,298,000	£1,060,000	£1,834,000	£11,867,000	£2,522,000	£20,581,000
<b>Total spend</b>	<b>£59,074,000</b>	<b>£25,459,000</b>	<b>£25,478,000</b>	<b>£109,863,000</b>	<b>£39,137,000</b>	<b>£259,011,000</b>

### Day Visits

<b>Tourism day visits</b>	<b>1,382,000</b>	<b>140,000</b>	<b>48,000</b>	<b>3,684,000</b>	<b>1,704,000</b>	<b>6,927,000</b>
<b>Day visit spend</b>	<b>£37,794,000</b>	<b>£3,873,000</b>	<b>£1,382,000</b>	<b>£128,115,000</b>	<b>£53,922,000</b>	<b>£224,324,000</b>

### Value

<b>Other Direct Spend</b>	<b>£6,307,000</b>	<b>£6,375,000</b>	<b>£2,215,000</b>	<b>£9,279,100</b>	<b>£9,341,000</b>	<b>£33,517,100</b>
<b>Total Direct</b>	<b>£88,947,000</b>	<b>£25,077,000</b>	<b>£25,076,000</b>	<b>£224,079,000</b>	<b>£86,615,000</b>	<b>£449,119,000</b>
<b>Indirect Impacts</b>	<b>£35,531,000</b>	<b>£12,708,000</b>	<b>£11,441,000</b>	<b>£77,805,000</b>	<b>£31,546,000</b>	<b>£168,847,000</b>

<b>Total Value</b>	<b>£130,785,000</b>	<b>£44,160,000</b>	<b>£38,732,000</b>	<b>£311,163,100</b>	<b>£127,502,000</b>	<b>£651,483,100</b>
--------------------	---------------------	--------------------	--------------------	---------------------	---------------------	---------------------

### Employment

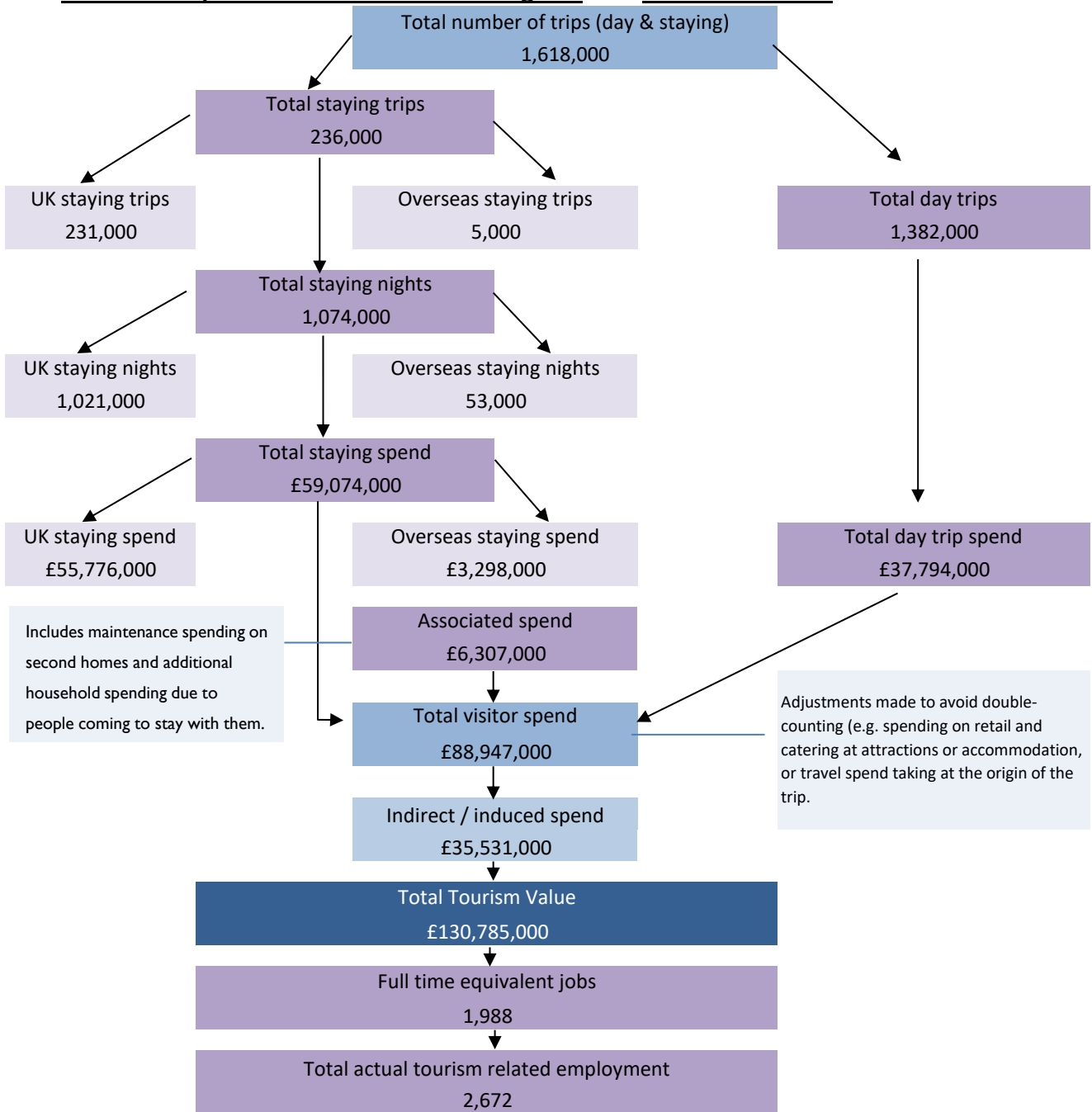
	<b>Northern Area</b>	<b>North East Area</b>	<b>North West Area</b>	<b>Great Yarmouth</b>	<b>Southern Area</b>	<b>Great Yarmouth Borough</b>
FTE employment	1,988	695	607	4,515	1,885	9,678
<b>Actual jobs</b>	<b>2,672</b>	<b>921</b>	<b>811</b>	<b>6,130</b>	<b>2,528</b>	<b>13,044</b>

### Accommodation Stock

<b>Type Accommodation</b>	<b>Count</b>	<b>Northern Area</b>	<b>North East Area</b>	<b>North West Area</b>	<b>Great Yarmouth</b>	<b>Southern Area</b>
Self catering units	Units	334	37	117	35	5
Touring caravans and tents	Pitches	934	218	698	342	684
Static vans, chalets, holiday centres	Units	2926	1699	544	1621	1748
Serviced (Hotels, guest houses, B&Bs)	Bed spaces	10	92	165	3432	179

**Economic Impact of Tourism – Headline Figures**

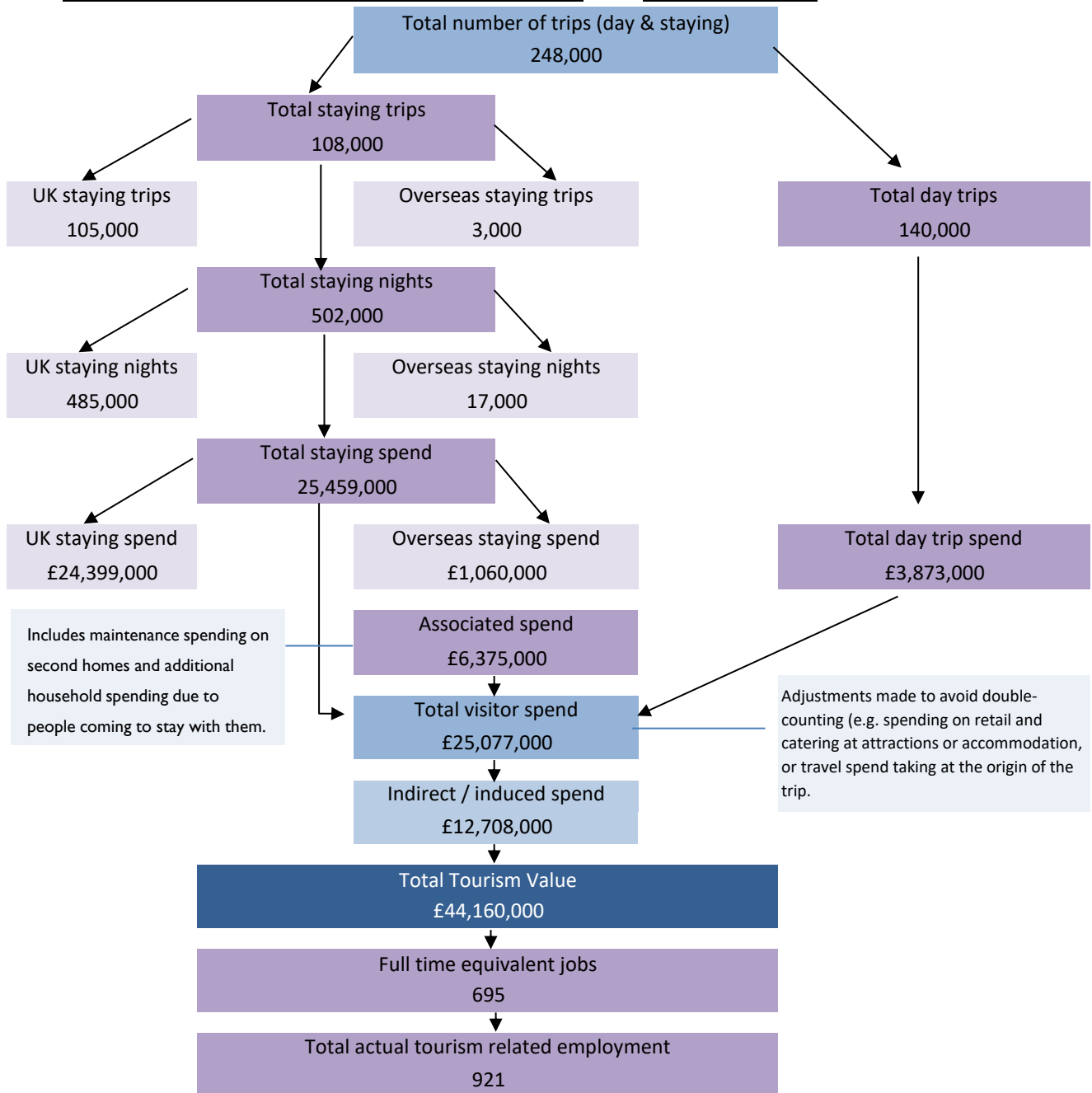
**Northern Area**



Economic Impact of Tourism	Northern Area
<b>Day Trips</b>	
	<b>2019</b>
Day trips Volume	1,382,000
Day trips Value	£37,794,000
<b>Staying trips</b>	
Number of trips	236,000
Number of nights	1,074,000
Trip value	£59,074,000
<b>Total Value</b>	<b>£130,785,000</b>
<b>Actual Jobs</b>	<b>2,672</b>

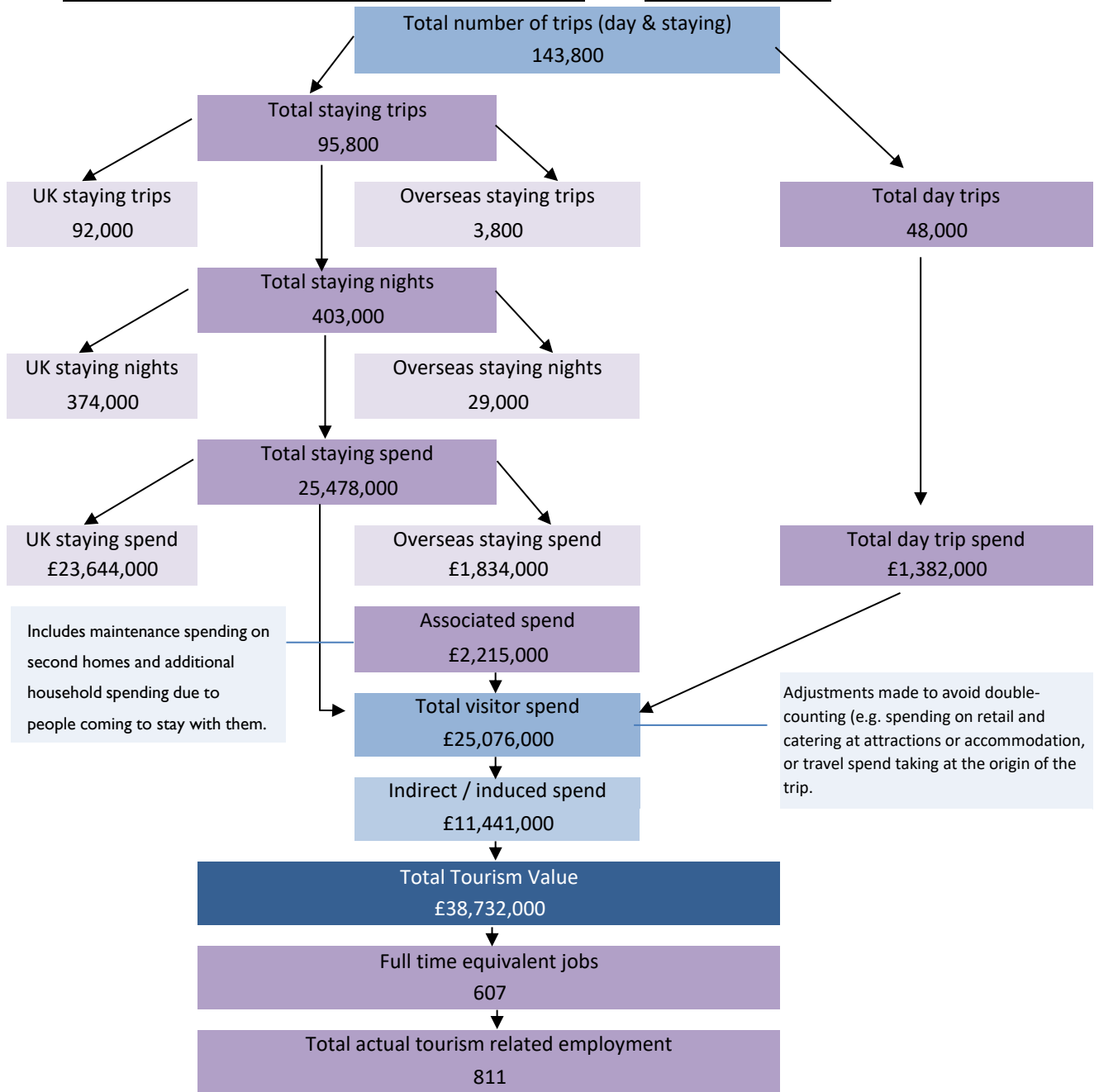


**Economic Impact of Tourism – Headline Figures**      **North East Area**



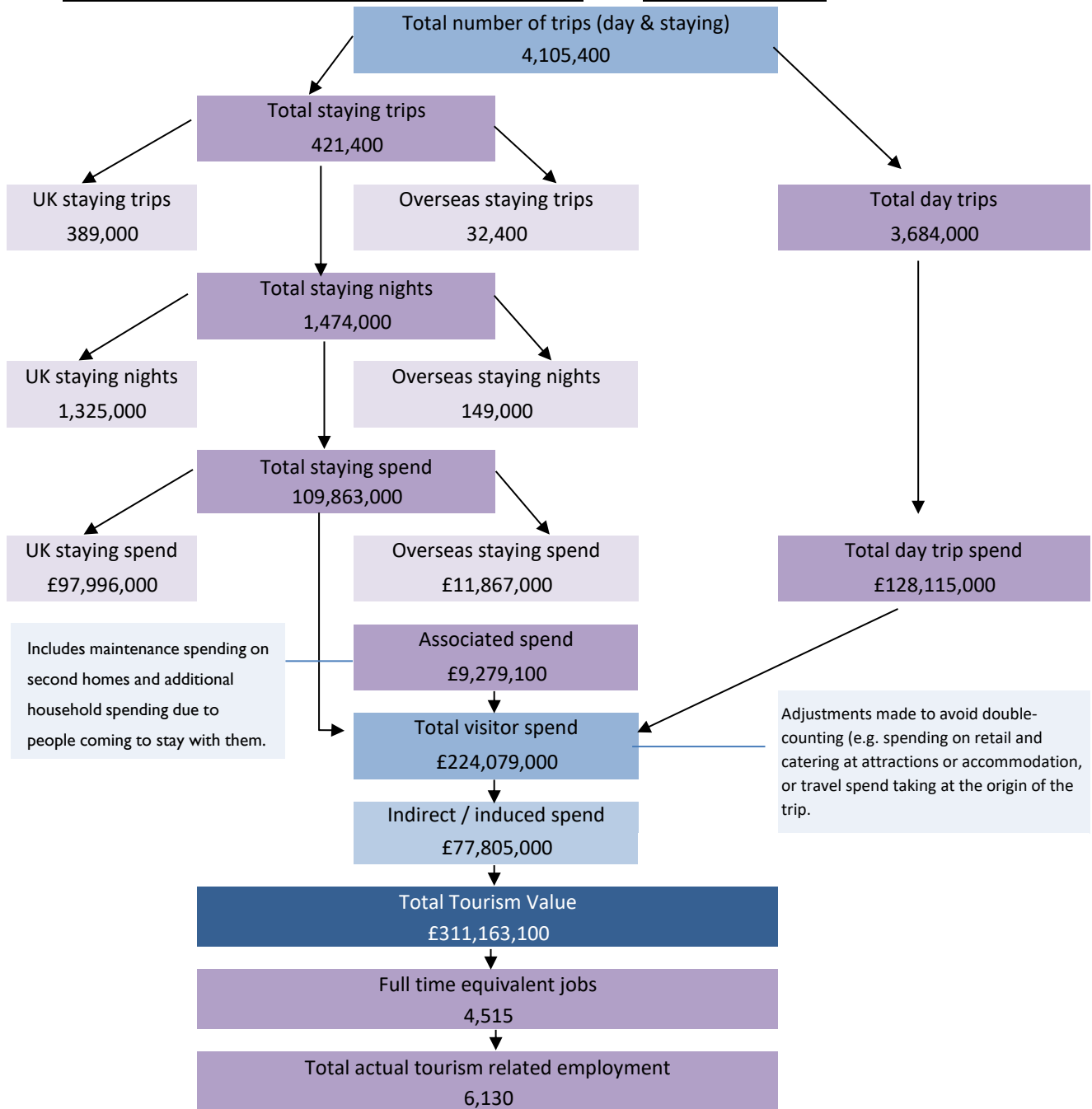
Economic Impact of Tourism	North East Area
<b>Day Trips</b>	<b>2019</b>
Day trips Volume	140,000
Day trips Value	£3,873,000
<b>Staying trips</b>	
Number of trips	108,000
Number of nights	502,000
Trip value	£25,459,000
<b>Total Value</b>	<b>£44,160,000</b>
<b>Actual Jobs</b>	<b>921</b>

**Economic Impact of Tourism – Headline Figures**      **North West Area**



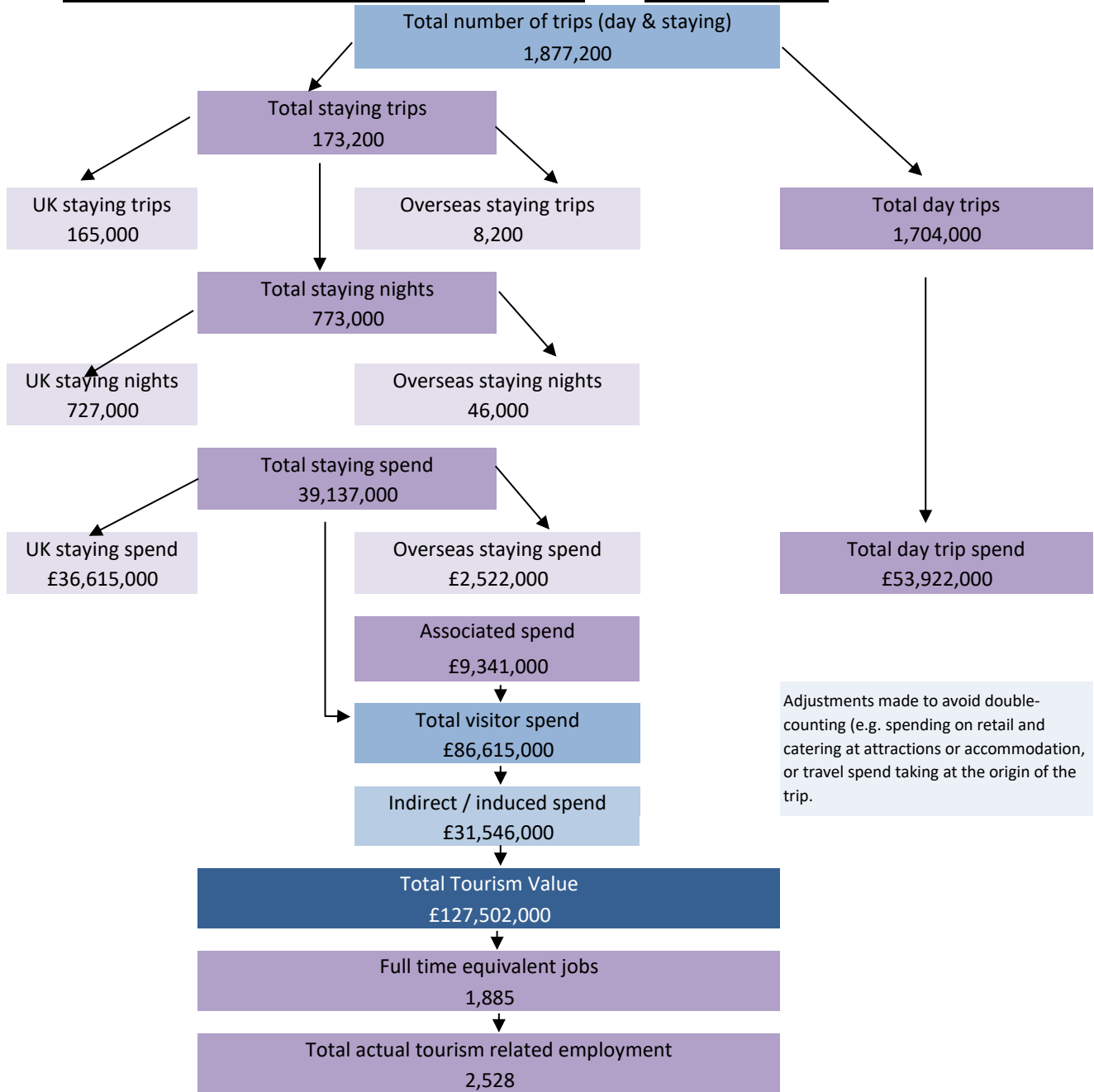
Economic Impact of Tourism	North West Area
<b>Day Trips</b>	
Day trips Volume	48,000
Day trips Value	£1,382,000
<b>Staying trips</b>	
Number of trips	95,800
Number of nights	403,000
Trip value	£25,478,000
<b>Total Value</b>	<b>£38,732,000</b>
<b>Actual Jobs</b>	<b>811</b>

**Economic Impact of Tourism – Headline Figures** **Great Yarmouth**



Economic Impact of Tourism	Great Yarmouth
<b>Day Trips</b>	<b>2019</b>
Day trips Volume	3,684,000
Day trips Value	£128,115,000
<b>Staying trips</b>	
Number of trips	421,400
Number of nights	1,474,000
Trip value	£109,863,000
<b>Total Value</b>	<b>£311,163,100</b>
<b>Actual Jobs</b>	<b>6,130</b>

## Economic Impact of Tourism – Headline Figures Southern Area



Economic Impact of Tourism	Southern Area
<b>Day Trips</b>	<b>2019</b>
Day trips Volume	1,704,000
Day trips Value	£53,922,000
<b>Staying trips</b>	
Number of trips	173,200
Number of nights	773,000
Trip value	£39,137,000
<b>Total Value</b>	<b>£127,502,000</b>
<b>Actual Jobs</b>	<b>2,528</b>

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

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

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

### **Limitations of the Model**

The methodology and accuracy of the above sources vary. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area changes year on year. This is as a result of the random probability nature of the methodology. As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.

It should be noted that the model cannot take into account any leakage of expenditure from tourists taking day trips out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas, in locations receiving significant numbers of day visitors from London, there is likely to be an underestimate in relation to the number of overseas day visitors staying in holiday accommodation in London.

Whilst it is important to be aware of these issues, we are confident that the estimates we have produced are as reliable as is practically possible within the constraints of the information available.

### **Rounding**

All figures used in this report have been rounded. Therefore, in some tables there may be a slight discrepancy between totals and sub totals.

### **Data sources**

The main national surveys used as data sources in stage one include:

- Great Britain Tourism Survey (GBTS) - information on tourism activity by GB residents;
- International Passenger Survey (IPS) information on overseas visitors to the United Kingdom;
- Day Visits in the annual Great Britain Day Visitor Survey using information on visits lasting more than 3 hours and taken on an irregular basis

These surveys provide information down to a regional level. In order to disaggregate data to a local level the following information sources are used:

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Mid- 2018 estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;
- Selected data on the countryside and coast including, national designations and length of the coastline.

### **Staying Visitors**

The GBTS provides information on the total number of trips to the region and the relative proportions using different types of accommodation. By matching these figures to the supply of such accommodation, the regional average number of trips per bedspace or unit of accommodation can be derived. The IPS provides information on the total number of trips by overseas visitors to the region. The model uses three year rolling averages to reduce extreme highs and lows which are due to small sample sizes, rather than being a reflection on drastic changes in demand year-on-year.

### **Day Visitors**

Information on day trips at the regional level is available from the Day Visits in Great Britain survey. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

### **Impact of tourism expenditure**

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

The GBTS, IPS and Day Visits to Great Britain survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

The New Earnings Survey which provides information on wage levels by industry sector and region; An internal business database which includes data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others. By applying the breakdown to the estimates of visitor spending, the model generates estimates of total direct spending.

Evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover – for example, some expenditure on food and drink actually takes place in inns and hotels that fall in the accommodation sector and within attractions. More significantly, expenditure on travel costs associated with individual trips is equally likely to take place at the origin of the trip as the destination. Therefore the model assumes that only 40% of travel expenditure accrues to the destination area.

### **Number of full time job equivalents**

Having identified the value of turnover generated by visitor spending, it is possible to estimate the employment associated with that spending. Wages for staff and drawings for the proprietors will absorb a proportion of that turnover. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated. The New Earnings Survey provides data from which the average costs by business sector, adjusted to take account of regional differences, can be calculated.

After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job.

### **Number of Actual Jobs**

The model generates estimates of full time equivalent jobs based on visitor spending. However, the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending (principally accommodation, food and drink, retail, attractions, transport). In general, the conversion factor between full time equivalent jobs and actual jobs varies around 1.5 in those sectors.

The indirect and induced jobs arise across a much wider range of employment sectors. Therefore, the average 1.16 for all sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs.

The employment estimates generated by the model include both self-employed and employed people supported by visitor expenditure. The model also includes an estimate of the additional jobs arising in the attractions sector, which are not related to visitor expenditure. However, the numbers do not include other tourism-related employment such as jobs in local authorities arising from their tourism functions, e.g. tourist information staff, additional public health, parks and gardens, public conveniences, maintenance sections and jobs arising from capital investment in tourism facilities.

**Produced for:**



**VISIT  
GREAT  
YARMOUTH**

**Produced by:**



**destinationresearch**  
delivering results : measuring what matters

Registered in England No. 9096970  
VAT Registration No. GB 192 3576 85

45 Colchester Road  
Manningtree  
CO11 2BA

Sergi Jarques  
Director  
Tel: 01206 392528  
[info@destinationresearch.co.uk](mailto:info@destinationresearch.co.uk)  
[www.destinationresearch.co.uk](http://www.destinationresearch.co.uk)