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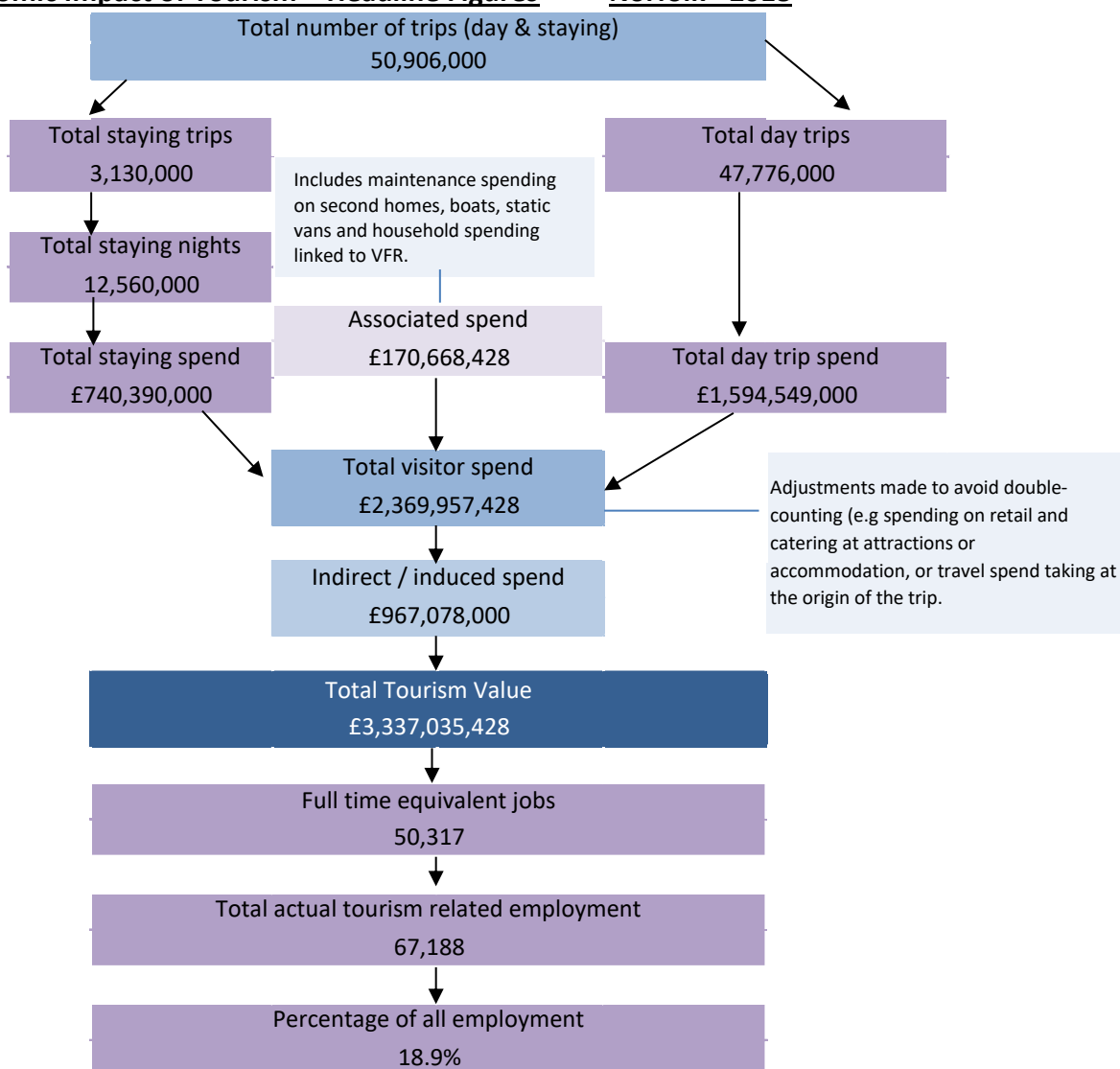


Economic Impact of Tourism

Norfolk - 2018

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Economic Impact of Tourism – Headline Figures Norfolk - 2018

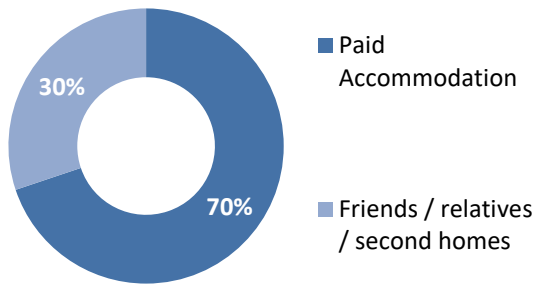


Economic Impact of Tourism – Year on year comparisons

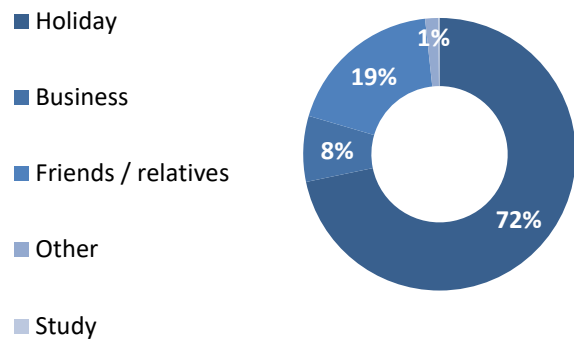
<u>Day Trips</u>	2017	2018	Annual variation
Day trips Volume	43,443,000	47,776,000	10%
Day trips Value	£1,531,461,000	£1,594,549,000	4%
<u>Overnight trips</u>			
Number of trip	3,266,000	3,130,000	-4%
Number of nights	13,492,000	12,560,000	-7%
Trip value	£747,682,000	£740,390,000	-1%
Total Value	£3,245,136,875	£3,337,035,428	3%
Actual Jobs	65,398	67,188	3%

	2017	2018	Variation
Average length stay (nights x trip)	4.13	4.01	-2.9%
Spend x overnight trip	£ 228.93	£ 236.55	3.3%
Spend x night	£ 55.42	£ 58.95	6.4%
Spend x day trip	£ 35.25	£ 33.38	-5.3%

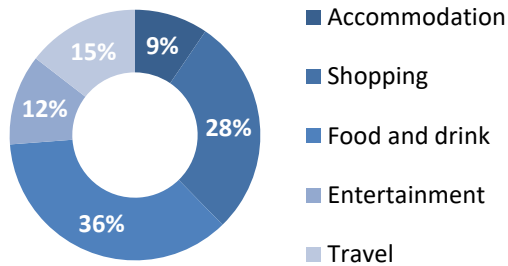
Type of Accommodation



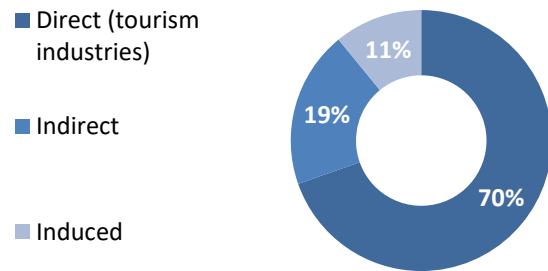
Trips by Purpose



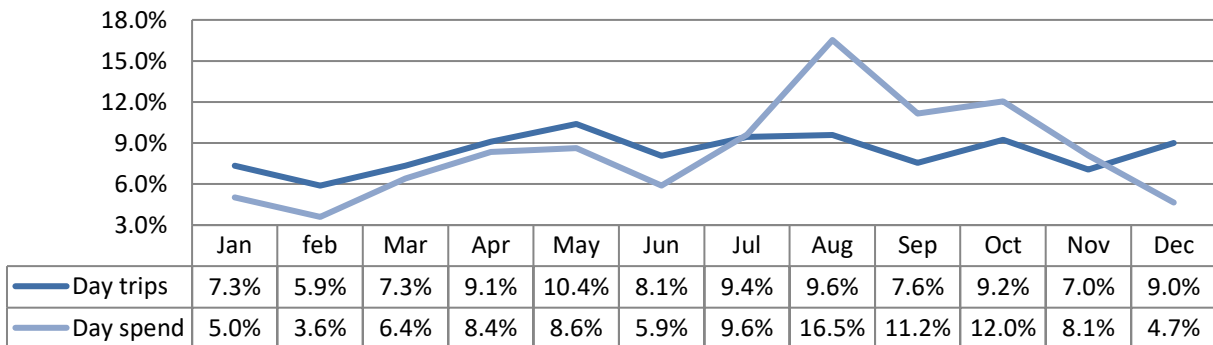
Breakdown of expenditure



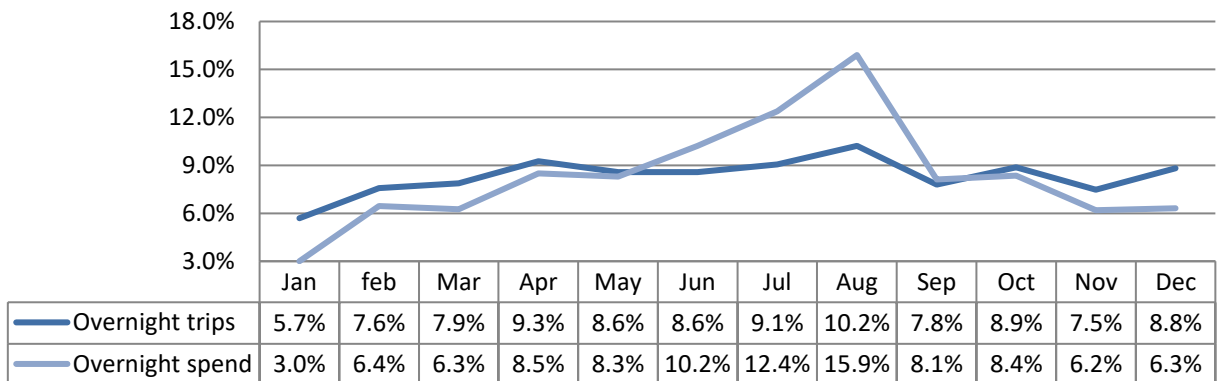
Type of employment



Seasonality - Day visitors (East of England)



Seasonality - Overnight visitors (East of England)



Contextual analysis

INTRODUCTION

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2018 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 2018, British residents took 97.4 million overnight trips in England, totalling 296 million nights away from home and expenditure of £19 billion, with an average trip length of 3 nights. The number of domestic trips to England was 3% lower than in 2017. Holiday Trips in England in 2018 decreased by 4% compared to 2017, with 45.2 million trips recorded.

Regional performance

The East of England region experienced a 12% drop in overnight trips during 2018. Bednights were down by 14% on 2017 and expenditure was also down by 8%. However, these results are on the back of a positive 2017 when the region experienced a 3% increase in overnight trips on the previous year. Bednights were up by 13% on 2016 and expenditure was also up by 13%.

The average spend per night in 2018 was £55.97 (up from £52.5 in 2017) and the spend per trip was £179.51 (up from £172.58 in 2017). The region received less visitors in 2018 than in the previous year. But importantly, their length of stay was unchanged from 2017 and spent more money during their visit, compared average expenditure levels in 2017.

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 2018 are an average of 2016, 2017 and 2018.

Visits from overseas

National Performance

The number of visits in 2018 fell 3% (from the 2017 record) to 37.9 million, after several years of growth since 2010. The value of spending also decreased by 7% (compared to 2017) to £22.90 billion. Average spend per visit was £604 in 2018, down from £625 per visit in 2017. The number of visitor nights spent in the UK fell by 7% in 2018 to 266 million, with the average number of nights per visit declining to 7.0 (from 7.3 in 2017).

Regional performance

The number of Overseas trips to the East of England in 2018 was down 9% at 2.2 million overnight trips (2.4 million in 2017). The total number of nights was down by 14% to 13.9 million. Spend was down by 13.6% to £704 million in 2018 (£815.2 million in 2017).

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 help smooth out short term market fluctuations and highlight longer-term trends.

Tourism Day Visits

National Performance

During 2017, UK residents took a total of 1,703 million Tourism Day Visits (down from 1,793 in 2017). Around £63.8 billion was spent during these trips, about 2.2% up on 2017.

The largest proportion of visits were taken to destinations in England (1,431 million visits or 84% of the total). The distribution of expenditure during visits broadly reflects this pattern, with a total value of day trips to England totalling £53.04 billion (83% of the total for GB).

Regional performance

During 2018, the volume tourism day visits in the East of England increased by 3.5% to 137.4 million. Spend was also up by 31% to £5.04 billion.

The Day Visitor Survey (GBDVS) data is a key driver for the Cambridge model. However, as with the GBTS and IPS, 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.

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	774,000	26%	49,000	25%	823,000	26%
Self catering	265,000	9%	10,000	5%	275,000	9%
Camping	286,000	10%	6,000	3%	292,000	9%
Static caravans	514,000	18%	3,000	2%	517,000	17%
Group/campus	51,000	2%	6,000	3%	57,000	2%
Paying guest	0	0%	5,000	3%	5,000	0%
Second homes	70,000	2%	3,000	2%	73,000	2%
Boat moorings	63,000	2%	0	0%	63,000	2%
Other	137,000	5%	10,000	5%	147,000	5%
Friends & relatives	774,000	26%	104,000	53%	878,000	28%
Total	2018	2,934,000	196,000		3,130,000	
Comparison	2017	3,056,000	210,000		3,266,000	
Difference		-4%	-7%		-4%	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	2,097,000	19%	198,000	15%	2,295,000	18%
Self catering	978,000	9%	213,000	16%	1,191,000	9%
Camping	1,344,000	12%	26,000	2%	1,370,000	11%
Static caravans	2,663,000	24%	8,000	1%	2,671,000	21%
Group/campus	123,000	1%	111,000	8%	234,000	2%
Paying guest	0	0%	40,000	3%	40,000	0%
Second homes	292,000	3%	17,000	1%	309,000	2%
Boat moorings	297,000	3%	0	0%	297,000	2%
Other	845,000	8%	21,000	2%	866,000	7%
Friends & relatives	2,579,000	23%	709,000	53%	3,288,000	26%
Total	2018	11,217,000	1,343,000		12,560,000	
Comparison	2017	11,934,000	1,558,000		13,492,000	
Difference		-6%	-14%		-7%	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£225,021,000	34%	£18,121,000	23%	£243,142,000	33%
Self catering	£68,377,000	10%	£13,410,000	17%	£81,787,000	11%
Camping	£95,834,000	14%	£1,246,000	2%	£97,080,000	13%
Static caravans	£119,215,000	18%	£784,000	1%	£119,999,000	16%
Group/campus	£8,238,000	1%	£6,353,000	8%	£14,591,000	2%
Paying guest	£0	0%	£2,718,000	3%	£2,718,000	0%
Second homes	£6,436,000	1%	£1,613,000	2%	£8,049,000	1%
Boat moorings	£14,134,000	2%	£0	0%	£14,134,000	2%
Other	£53,677,000	8%	£1,296,000	2%	£54,973,000	7%
Friends & relatives	£71,097,000	11%	£32,821,000	42%	£103,918,000	14%
Total	2018	£662,029,000	£78,361,000		£740,390,000	
Comparison	2017	£657,144,000	£90,538,000		£747,682,000	
Difference		1%	-13%		-1%	

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	2,200,000	75%	44,000	22%	2,244,000	72%
Business	205,000	7%	39,000	20%	244,000	8%
Friends & relatives	489,000	17%	98,000	50%	587,000	19%
Other	39,000	1%	10,000	5%	49,000	2%
Study	0	0%	4,000	2%	4,000	0%
Total	2018	2,934,000	196,000		3,130,000	
Comparison	2017	3,056,000	210,000		3,266,000	
Difference		-4%	-7%		-4%	

Nights by Purpose

	UK		Overseas		Total	
Holiday	8,563,000	76%	237,000	18%	8,800,000	70%
Business	636,000	6%	188,000	14%	824,000	7%
Friends & relatives	1,907,000	17%	743,000	55%	2,650,000	21%
Other	112,000	1%	63,000	5%	175,000	1%
Study	0	0%	112,000	8%	112,000	1%
Total	2018	11,217,000	1,343,000		12,560,000	
Comparison	2017	11,934,000	1,558,000		13,492,000	
Difference		-6%	-14%		-7%	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£523,284,000	79%	£16,978,000	22%	£540,262,000	73%
Business	£57,860,000	9%	£14,627,000	19%	£72,487,000	10%
Friends & relatives	£69,714,000	11%	£35,263,000	45%	£104,977,000	14%
Other	£11,171,000	2%	£4,179,000	5%	£15,350,000	2%
Study	£0	0%	£7,314,000	9%	£7,314,000	1%
Total	2018	£662,029,000	£78,361,000		£740,390,000	
Comparison	2017	£657,144,000	£90,538,000		£747,682,000	
Difference		1%	-13%		-1%	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

	Trips		Spend	
Urban visits	28,694,000		£1,036,288,000	
Countryside visits	12,134,000		£363,324,000	
Coastal visits	6,948,000		£194,937,000	
Total	2018	47,776,000	£1,594,549,000	
Comparison	2017	43,443,000	£1,531,461,000	
Difference		10%	4%	

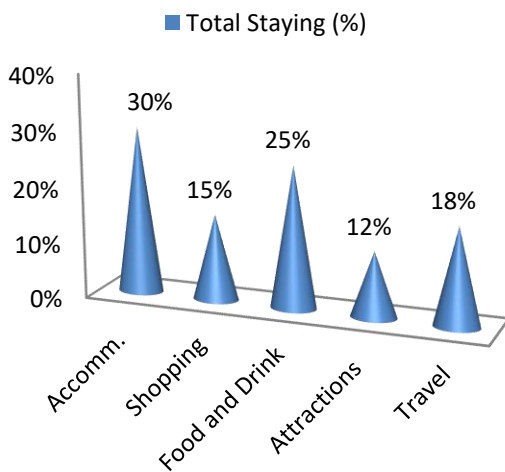
Value of Tourism

Expenditure Associated with Trips:

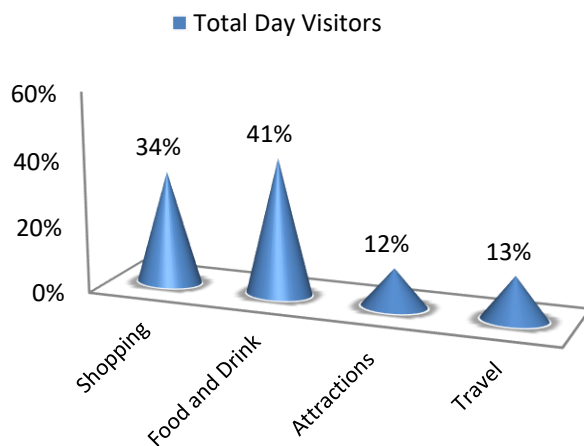
Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£200,237,000	£91,648,000	£170,895,000	£77,397,000	£121,853,000	£662,030,000
Overseas tourists	£21,405,000	£22,421,000	£17,427,000	£9,296,000	£7,812,000	£78,361,000
Total Staying	£221,642,000	£114,069,000	£188,322,000	£86,693,000	£129,665,000	£740,391,000
Total Staying (%)	30%	15%	25%	12%	18%	100%
Total Day Visitors	£0	£544,459,000	£654,828,000	£185,802,000	£209,462,000	#####
Total Day Visitors	0%	34%	41%	12%	13%	100%
Total 2018	£221,642,000	£658,528,000	£843,150,000	£272,495,000	£339,127,000	£2,334,942,000
%	9%	28%	36%	12%	15%	100%
Comparison 2017	£226,309,000	£640,393,000	£817,964,000	£266,929,000	£327,549,000	£2,279,144,000
Difference	-2%	3%	3%	2%	4%	2%

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
£22,293,000	£2,773,260	£19,412,168	£126,190,000	£170,668,428

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		£225,408,000	£13,097,000	£238,505,000
Retail		£112,928,000	£539,014,000	£651,942,000
Catering		£182,672,000	£635,183,000	£817,855,000
Attractions		£89,717,000	£197,794,000	£287,511,000
Transport		£77,799,000	£125,677,000	£203,476,000
Non-trip spend		£170,668,428	£0	£170,668,428
Total Direct	2018	£859,192,428	£1,510,765,000	£2,369,957,428
Comparison	2017	£849,057,875	£1,450,976,000	£2,300,033,875
Difference		1%	4%	3%

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		£219,898,000	£365,447,000	£585,345,000
Non trip spending		£34,134,000	£0	£34,134,000
Income induced		£239,053,000	£108,546,000	£347,599,000
Total	2018	£493,085,000	£473,993,000	£967,078,000
Comparison	2017	£489,816,000	£455,287,000	£945,103,000
Difference		1%	4%	2%

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		£859,192,428	£1,510,765,000	£2,369,957,428
Indirect		£493,085,000	£473,993,000	£967,078,000
Total Value	2018	£1,352,277,428	£1,984,758,000	£3,337,035,428
Comparison	2017	£1,338,873,875	£1,906,263,000	£3,245,136,875
Difference		1%	4%	3%

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	3,768	29%	219	1%	3,986	12%
Retailing	978	8%	4,670	24%	5,648	17%
Catering	2,836	22%	9,860	51%	12,696	39%
Entertainment	1,702	13%	3,753	19%	5,455	17%
Transport	559	4%	903	5%	1,462	5%
Non-trip spend	3,161	24%	0	0%	3,161	10%
Total FTE	2018	13,003		19,405	32,408	
Comparison	2017	12,792		18,639	31,432	
Difference		2%		4%	3%	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	5,576	31%	324	1%	5,900	13%
Retailing	1,467	8%	7,004	24%	8,472	18%
Catering	4,254	24%	14,791	52%	19,044	41%
Entertainment	2,400	13%	5,292	18%	7,692	16%
Transport	788	4%	1,273	4%	2,061	4%
Non-trip spend	3,603	20%	0	0%	3,603	8%
Total Actual	2018	18,088		28,683	46,772	
Comparison	2017	17,894		27,552	45,446	
Difference		1%		4%	3%	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	4,704	6,768	11,472
Induced jobs	4,427	2,010	6,437
Total FTE	2018	9,131	17,909
Comparison	2017	9,071	17,502
Difference		1%	2%

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	5,363	7,715	13,078
Induced jobs	5,047	2,292	7,338
Total Actual	2018	10,410	20,416
Comparison	2017	10,341	19,952
Difference		1%	2%

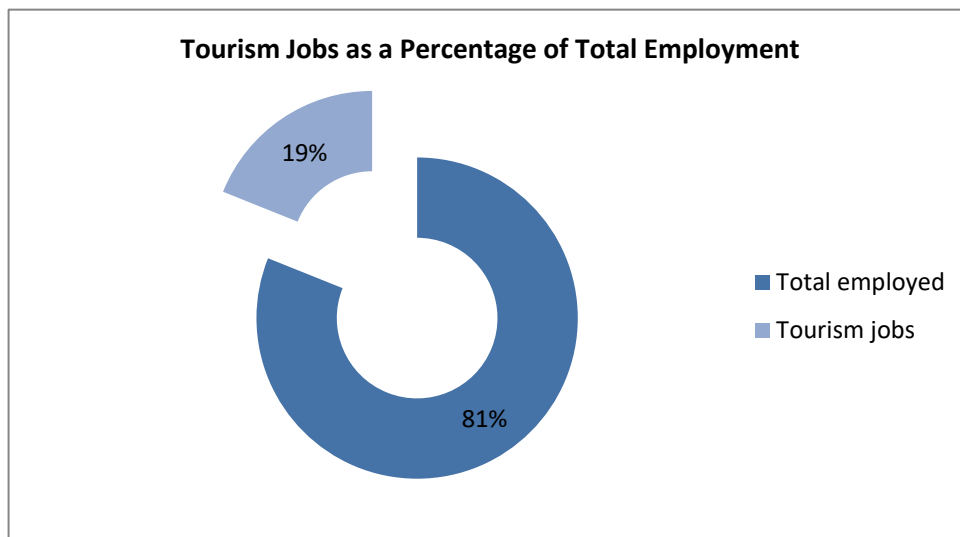
Total Jobs

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	13,003	59%	19,405	69%	32,408	64%
Indirect	4,704	21%	6,768	24%	11,472	23%
Induced	4,427	20%	2,010	7%	6,437	13%
Total FTE	2018	22,135		28,182	50,317	
Comparison	2017	21,863		27,070	48,934	
Difference		1%		4%	3%	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Direct	18,088	63%	28,683	74%	46,772	70%
Indirect	5,363	19%	7,715	20%	13,078	19%
Induced	5,047	18%	2,292	6%	7,338	11%
Total Actual	2018	28,498		38,690	67,188	
Comparison	2017	28,234		37,164	65,398	
Difference		1%		4%	3%	

Tourism Jobs as a Percentage of Total Employment

	Staying Visitor	Day visitors	Total
Total employed	355,000	355,000	355,000
Tourism jobs	28,498	38,690	67,188
Proportion all jobs	8%	11%	19%
Comparison	2017	28,234	37,164
Difference	1%	4%	3%



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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