



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



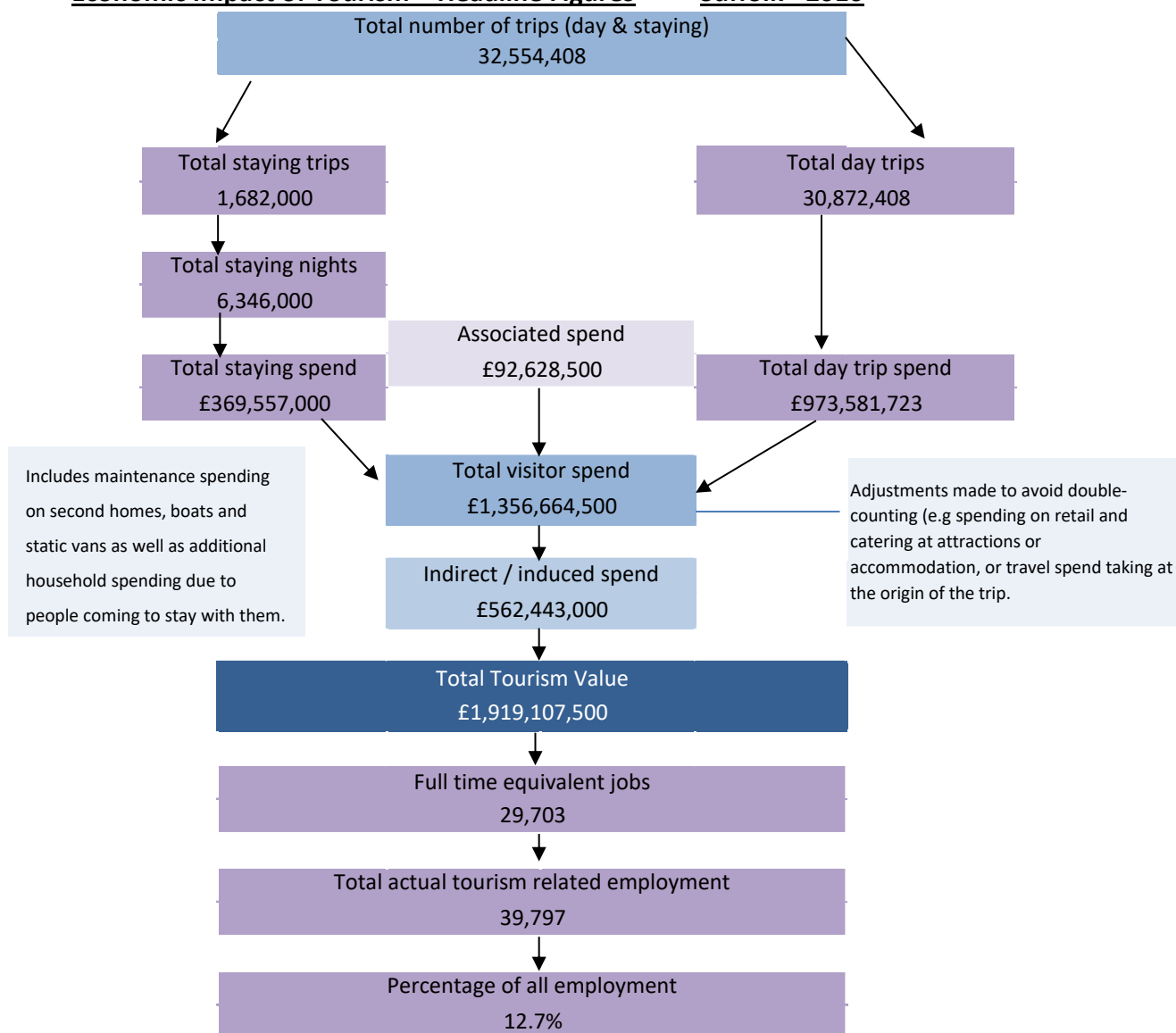
Produced by:

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Economic Impact of Tourism

Suffolk - 2016

Economic Impact of Tourism – Headline Figures Suffolk - 2016

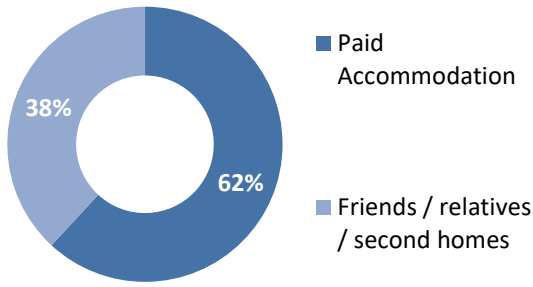


Economic Impact of Tourism – Year on year comparisons

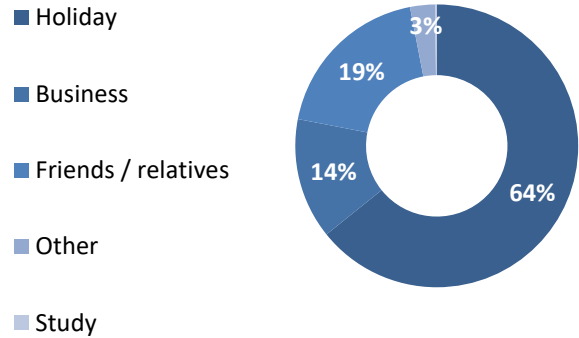
| Day Trips | 2015 | 2016 | Annual variation |
|------------------------|-----------------------|-----------------------|------------------|
| Day trips Volume | 30,251,030 | 30,872,408 | 2.1% |
| Day trips Value | £953,738,707 | £973,581,723 | 2.1% |
| Overnight trips | | | |
| Number of trip | 1,699,000 | 1,682,000 | -1.0% |
| Number of nights | 6,281,000 | 6,346,000 | 1.0% |
| Trip value | £359,927,000 | £369,557,000 | 2.7% |
| Total Value | £1,875,351,000 | £1,919,107,500 | 2.3% |
| Actual Jobs | 38,889 | 39,797 | 2.3% |

| | 2015 | 2016 | Variation |
|-------------------------------------|----------|----------|-----------|
| Average length stay (nights x trip) | 3.70 | 3.77 | 2.1% |
| Spend x overnight trip | £ 211.85 | £ 219.71 | 3.7% |
| Spend x night | £ 57.30 | £ 58.23 | 1.6% |
| Spend x day trip | £ 31.53 | £ 31.54 | 0.0% |

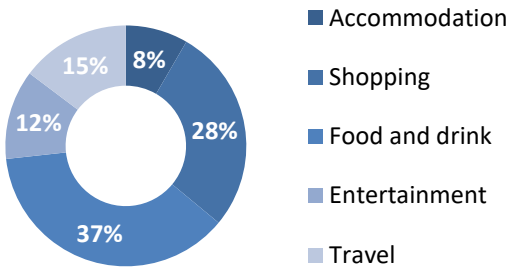
Type of Accommodation



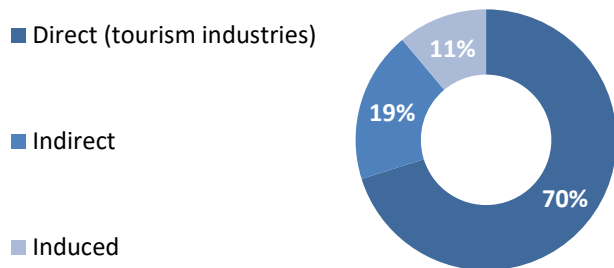
Trips by Purpose



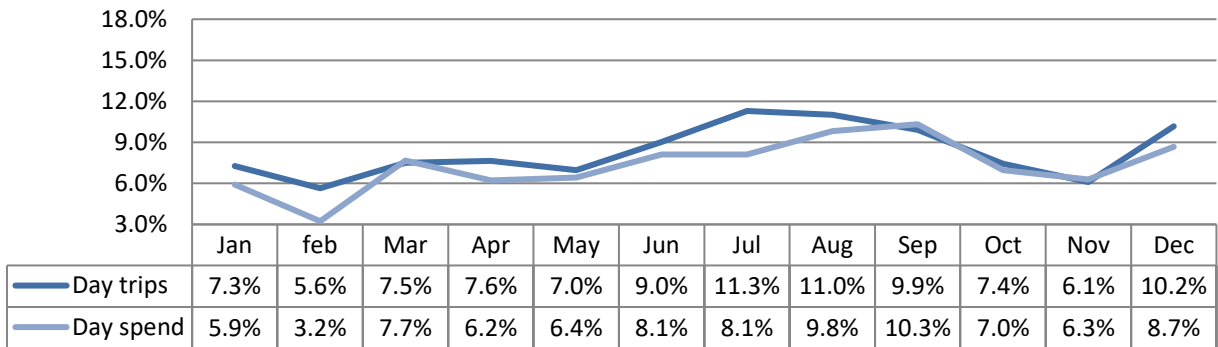
Breakdown of expenditure



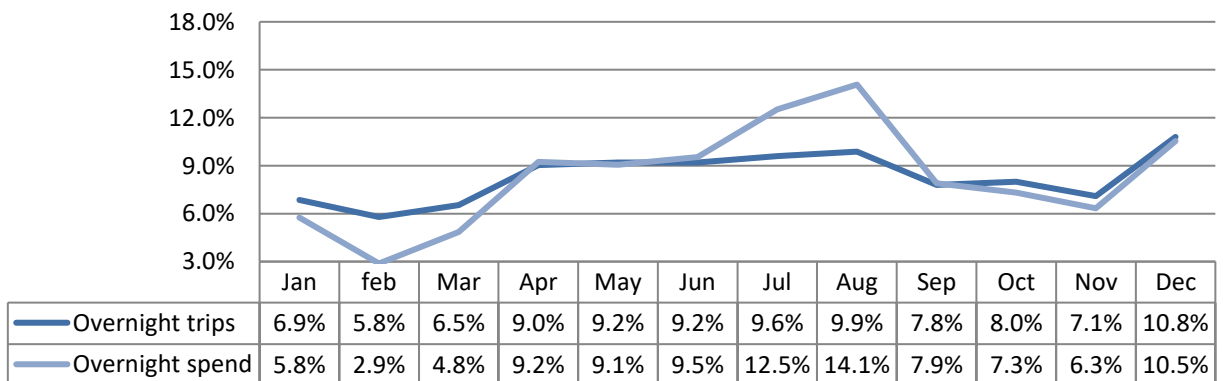
Type of employment



Seasonality - Day visitors



Seasonality - Overnight visitors



CONTEXTUAL ANALYSIS

INTRODUCTION

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2016 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 2016, British residents took 99.3 million overnight trips in England, totalling 295 million nights away from home. The number of domestic trips was 4% lower than in 2014, and nights were down by 5% in 2015. Holiday Trips in England in 2016 increased by +2% compared to the same period last year, with 44.7 million trips recorded. Visits to friends and relatives decreased by -9% to 36.9 million. Business trips increased for the January to December period, up by +2% to 14.1 million.

Regional performance

The East of England region experienced a 3% drop in overnight trips during 2016. Bednights were up by 2% on 2015 and expenditure was up by 2%. This resulted in an increase in the average length of trips (the number of night per trip) from 2.9 nights per trip in 2015 to 3.2 in 2016.

The average spend per night was unchanged at £57.7 and the spend per trip was up from £165.60 in 2015 to £183.11 in 2016. The region received less visitors in 2016 than in the previous year. However, those who did visit stayed for longer, which resulted in an average greater expenditure levels per trip.

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 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.

Visits from overseas

National Performance

The number of visits in 2016 grew 4% to a record 37.6 million, after several years of growth since 2010. The number of visitor nights spent in the UK increased by 2% in 2016 to 277 million, with the average number of nights per visit declining at 7.4.

The value of spending increased by 2% to £22.5 billion. Average spend per visit was £599 in 2016, down from the peak of £650 per visit in 2013 and reflecting a lower spend per visit, due to shorter average length of stay.

Regional performance

The number of Overseas trips to the East of England in 2016 grew 10% to reach 2.4 million overnight trips. The total number of nights was down by 1.5% to 16.4 million. Spend was down by 11% to £854 million in 2016.

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 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. Based on data for the period 2014-2016 the model assumes that the number of overseas trips to the East region in 2016 was up by 6%. The total number of nights was up by 4%. Spend remain unchanged.

Tourism Day Visits

National Performance

During 2016, GB residents took a total of 1,834 million Tourism Day Visits to destinations in England, Scotland or Wales, 3% up from 2015. Around £64 billion was spent during these trips, less than 1% up from 2015.

The largest proportion of visits were taken to destinations in England (1,557 million visits or 85% of the total). The distribution of expenditure during visits broadly reflects this pattern, with a total value of day trips to England totalling £53.5 billion (84%) of the total for GB).

Regional performance

During 2016, the volume tourism day visits in the East of England increased by 3% to 140 million with a 4% decrease in expenditure (down to approximately £3.5 billion). The Visits to Visitor Attractions Survey (2016) shows that the volume of visitors to fee paying attractions in the East was up by 5% between 2015 and 2016.

We have used changes in admission charges as well as gross revenue levels to estimate likely visitor expenditure levels. The results show an approximate 8% increase in admission fees and a 6% growth in gross revenue. However, not all areas experienced the same level of growth. Growth revenue was up 6% in coastal areas, 5% up in rural areas and 8% up in more urban areas.

Based on these results the model assumes day trips to be up 3% and expenditure to increase by approximately 4%, meaning that expenditure per trip has increased slightly 2015 and 2016.

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