MANSTON AIRPORT DEVELOPMENT CONSENT ORDER EXAMINATION SUBMISSION TO DEADLINE 11:

ALL PEOPLE – ECONOMICALLY ACTIVE –UNEMPLOYED (MODEL BASED) THANET

1. We respectfully draw the Examining Authority's attention to an excerpt from the Nomis Official Labour Market Statistics[1]. The full report is attached as an attachment.

		THANET %	SOUTH-EAST %	GB %
Apr 13-Mar 14	6,500	10.5	5.4	7.2
Jul 13-Jun 14	6,000	9.7	5.1	6.9
Oct 13-Sep 14	5,900	9.8	4.8	6.5
Jan 14-Dec 14	6,100	10.1	4.8	6.2
Apr 14-Mar 15	5,900	9.1	4.6	6.0
Jul 14-Jun 15	5,700	8.8	4.5	5.6
Oct 14-Sep 15	5,100	8.2	4.3	5.4
Jan 15-Dec 15	4,600	7.3	4.2	5.2
Apr 15-Mar 2016	4,500	7.0	4.1	5.1
Jul 15-Jun 2016	4,500	6.9	4.1	5.1
Oct 15-Sep 2016	4,900	7.2	4.2	4.9
Jan 2016-Dec 2016	4,400	6.4	4.0	4.8
Apr 2016-Mar 2017	3,800	5.8	3.8	4.7
Jul 2016-Jun 2017	3,600	5.1	3.5	4.6
Oct 2016-Sep 2017	3,500	4.6	3.4	4.5
Jan 2017-Dec 2017	3,400	4.5	3.2	4.4
Apr 2017-Mar 2018	3,700	5.1	3.4	4.3
Jul 2017-Jun 2018	3,900	5.6	3.5	4.2
Oct 2017-Sep 2018	3,200	5.0	3.4	4.2
Jan 2018-Dec 2018	2,900	4.5	3.4	4.2

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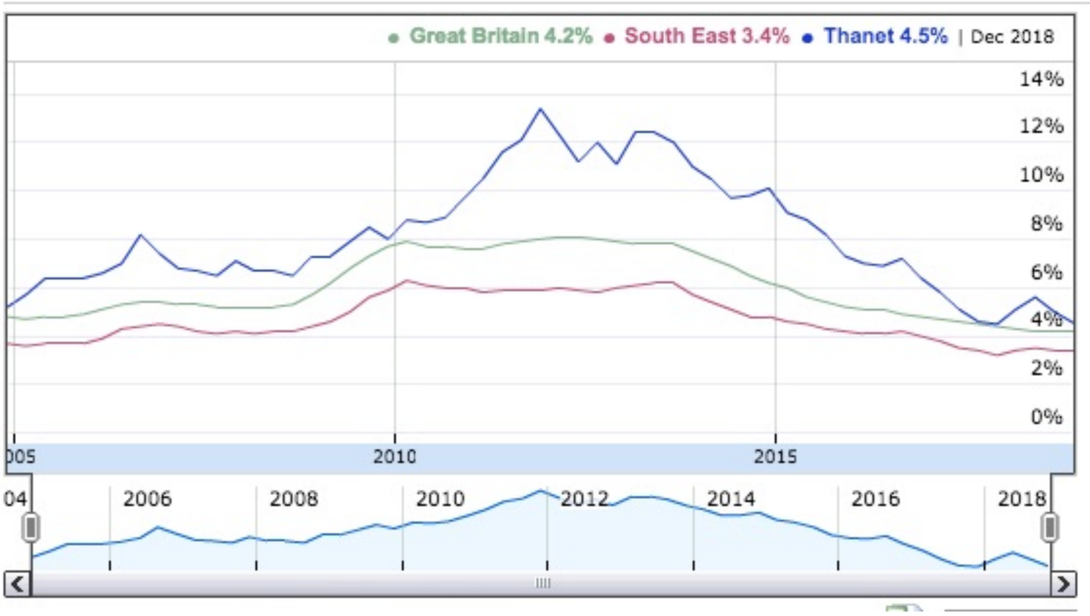
Source: ONS Annual Population Survey

Note: numbers and % are for those aged 16 and over. % is a proportion of economically active

2. As the Examining Authority will be aware the former airport closed in or around May 2014.

[1] Nomis Official Labour Market Statistics: All People – Economically Active – Unemployed (Model Based) Thanet report run as of today's date 4 July 2019.

Graph[2] showing All people- Economically active – Unemployed (Model Based) Thanet



3. It is clear from the Nomis Official Labour Market Statistics that Thanet's percentage of Economically Active and Unemployed has significantly reduced since the closure of the former airport and is in line with the rest of Great Britain.
4. A comparison has been drawn with the South East.
5. As the Examining Authority will be aware the South East is one of the comparators in the graph and table above.
6. A comparison has been made of Thanet's progress against the rest of the South East during the Examination.
7. As the Examining Authority will be aware the South East holds its position as the UK's second-most prosperous region[3], with the second-highest GDP per capita at £27,847, and household expenditure at £612 per week – second only to London.

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[2] Source of Graph: https://www.nomisweb.co.uk/reports/lmp/la/1946157320/subreports/ea_time_series/report.aspx?

[3] https://wealth.barclays.com/en_gb/home/research/research-centre/uk-prosperity-map/south-east.html
PDF attached

8. It is therefore a measure of success that Thanet is closing the gap with the South East[4].

9. This is in part, down to the rise in tourism in Thanet with 1 in 5 people in Thanet working in the tourism industry[5].

10. Thanet District Council confirmed at [REP9-XXX] at SE.4 Socio-Economic Effects that:

"*The Thanet Visitor Study 2018 does not affect TDC's stance in that whilst the proposed development may bring further tourists to the area, the amenity impacts from the construction and operation of the proposed development* ***may adversely affect the tourism industry in Ramsgate and the wider Thanet area and weigh against any proposed benefit***".

[4] Nomis Official Labour Market Statistics: All People – Economically Active – Unemployed (Model Based) Thanet report run as of today's date 4 July 2019.
[5] Economic Impact of Tourism, Thanet – 2017 results, Commissioned by Visit Kent and Produced by Destination Research, November 2018 Page 6

All people - Economically active - Unemployed (Model Based)
Thanet

Date	Thanet	Thanet (%)	South East (%)	Great Britain (%)
Jan 04-Dec 04	3,100	5.2	3.7	4.8
Apr 04-Mar 05	3,300	5.7	3.6	4.7
Jul 04-Jun 05	3,800	6.4	3.7	4.8
Oct 04-Sep 05	3,800	6.4	3.7	4.8
Jan 05-Dec 05	3,900	6.4	3.7	4.9
Apr 05-Mar 06	3,900	6.6	3.9	5.1
Jul 05-Jun 06	4,000	7.0	4.3	5.3
Oct 05-Sep 06	4,600	8.2	4.4	5.4
Jan 06-Dec 06	4,200	7.4	4.5	5.4
Apr 06-Mar 07	3,800	6.8	4.4	5.3
Jul 06-Jun 07	3,700	6.7	4.2	5.3
Oct 06-Sep 07	3,700	6.5	4.1	5.2
Jan 07-Dec 07	3,800	7.1	4.2	5.2
Apr 07-Mar 08	3,800	6.7	4.1	5.2
Jul 07-Jun 08	4,000	6.7	4.2	5.2
Oct 07-Sep 08	4,000	6.5	4.2	5.3
Jan 08-Dec 08	4,500	7.3	4.4	5.7
Apr 08-Mar 09	4,700	7.3	4.6	6.2
Jul 08-Jun 09	4,900	7.9	5.0	6.8
Oct 08-Sep 09	5,300	8.5	5.6	7.3
Jan 09-Dec 09	5,200	8.0	5.9	7.7
Apr 09-Mar 10	5,500	8.8	6.3	7.9
Jul 09-Jun 10	5,500	8.7	6.1	7.7
Oct 09-Sep 10	5,700	8.9	6.0	7.7
Jan 10-Dec 10	6,100	9.7	6.0	7.6
Apr 10-Mar 11	6,400	10.5	5.8	7.6
Jul 10-Jun 11	7,000	11.6	5.9	7.8
Oct 10-Sep 11	7,200	12.1	5.9	7.9
Jan 11-Dec 11	7,600	13.4	5.9	8.0
Apr 11-Mar 12	7,200	12.3	6.0	8.1
Jul 11-Jun 12	6,800	11.2	5.9	8.1
Oct 11-Sep 12	6,500	12.0	5.8	8.0
Jan 12-Dec 12	6,500	11.1	6.0	7.9
Apr 12-Mar 13	7,100	12.4	6.1	7.8
Jul 12-Jun 13	7,200	12.4	6.2	7.8
Oct 12-Sep 13	7,100	12.0	6.2	7.8
Jan 13-Dec 13	6,700	11.0	5.7	7.5
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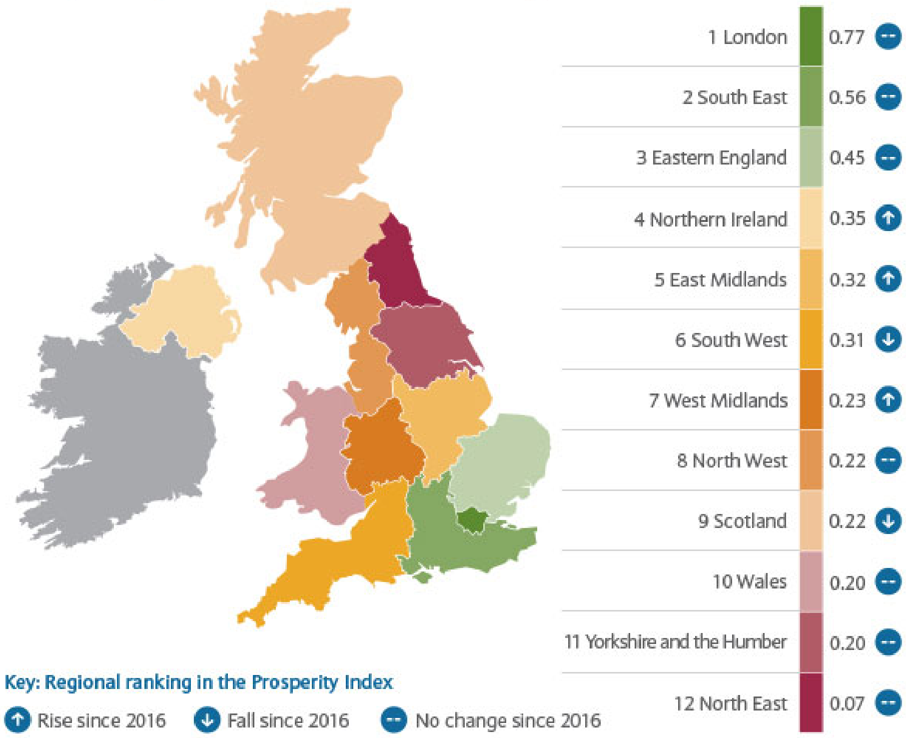
Source: ONS Annual Population Survey

Note: numbers and % are for those aged 16 and over. % is a proportion of economically active

UK Prosperity Map 2017

The UK Prosperity Map from Barclays Wealth & Investments is an in-depth view of the different prosperity drivers across the UK regions. The map compiles a series of different measures gleaned from official data – including GDP, employment, enterprise figures, household expenditure and number of millionaires – to give an overall Index score for each region.

Prosperity Index scores – region



UK cities

Cities are outpacing their wider region, with clear disparities opening up when it comes to GDP per capita and earnings.

London

London remains in 1st place with expenditure growth of 5.9% and the highest GDP per capita, despite only growing by 1.6%.

South East

South East remains in 2nd place, with the second-lowest level of unemployment at 4% and a 6.1% increase in millionaires.

East of England

The East of England keeps its third-place spot with a 7% increase in house prices and a 9.3% increase in the number of millionaires, the UK’s greatest increase.

Northern Ireland

Northern Ireland is up one place to 4th, with a 3.8% increase in household expenditure and an 8.7% growth in millionaires.

East Midlands

East Midlands is prospering and has moved up to 5th place, with a 2.7% growth in wages and a 6% increase in house prices.

South West

South West falls two places to 6th but has a healthy housing market that saw an increase of 5% and a 2% increase in GDP per capita.

West Midlands

West Midlands climbs two places to 7th, thanks to a 3.9% increase in average earnings and a 6% rise in house prices.

North West

North West remains in 8th place with GDP per capita up 3% and house prices increasing by 5%.

Scotland

Scotland drops two places to 9th but GDP per capita rose by 1.8% while average earnings saw a 2.5% increase – the third highest in the UK.

Wales

Wales stays in 10th place but sees a 2.8% increase in GDP per capita and a 4% increase in house prices.

Yorkshire & Humberside

Yorkshire and Humberside stays in 11th place but enjoys a 4% boost in house prices and a 2.4% increase in GDP per capita.

North East

North East keeps its 12th place position but saw a 4% rise in house prices and a 2.8% rise in GDP.

destinationresearch
delivering results : measuring what matters

Commissioned by:

Visit Kent

VISIT KENT
GARDEN of ENGLAND

Economic Impact of Tourism

Thanet - 2017 Results

Produced by:

Destination Research
www.destinationresearch.co.uk

November 2018

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Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2017 and provides comparative data against the previously published data for Kent (2015).

Destination Research was commissioned by Visit Kent to produce 2017 results based on the latest data from national tourism surveys and regionally/locally based data. The results are derived using the Cambridge Economic Impact Model.

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 district (e.g. local attractions data, boat moorings, language schools in the area, accommodation stock, etc.). See Appendix I for further details.

Contextual analysis

Domestic tourism

In 2017, British residents took 100.6 million overnight trips in England, totalling 299 million nights away from home, with an expenditure of £19.05 billion. £189.31 was spent per trip, and with an average trip length of 2.97 nights, the average spend per night was £63.62. The number of domestic trips was 2% up on 2015, and the amount spent was also up by 2%.

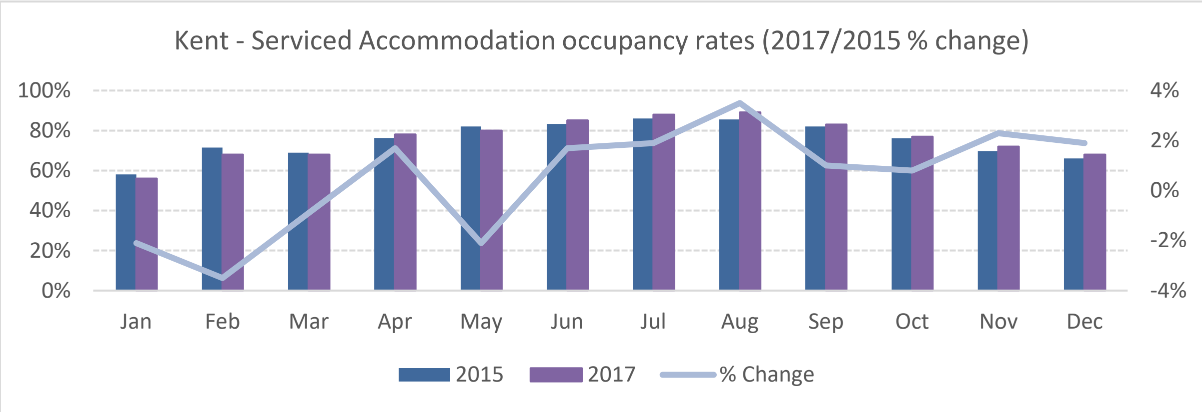
The South East region experienced a 1% increase in overnight trips between 2015 and 2017. Bednights were up 2% on 2015 and expenditure was up by 3%. The region received slightly more visitors in 2017 than in 2015 and visitors spent slightly more per night than in 2015. The average spend per night was up from £56.53 per night in 2015 to £59.01 in 2017.

Domestic visits to Kent

The domestic tourism results for Kent used in this model combine a mixture of supply and demand data. We do this because extracting county level data from national surveys can sometimes lead to inaccurate results due to low sample sizes. According to the GB Tourism Survey (demand side), Kent experienced a 1% decrease in the volume of trips between 2015 and 2017. Nights were down 2% and expenditure was also down by 1%.

In 2017, serviced accommodation providers saw an average occupancy of 76%, compared to the 75.5% witnessed in 2015, an increase of 0.5%. By combining the supply and demand results we estimate that trips to Kent were down by a marginal rate of 0.3%, nights per trip were up by 1.9% and expenditure increased by 2.9%.

Please note that the Cambridge Model uses three year rolling averages to reduce some of the more extreme fluctuations which are due to small sample sizes and high margins or error.



Visits from overseas

As with domestic tourism, the Cambridge Model uses three year averages to estimate changes in overseas tourism to reduce some of the more extreme fluctuations which can be attributed to small sample sizes and high margins or error. At national level, the number of visits in 2017 grew by 10% reaching 33 million. The number of visitor nights spent in the UK increased by 7% between 2015 and 2017 to reach 245.7 million, with the average number of nights per visit standing at 7.4.

Overseas trips to the South England region were 9% up on 2015 to reach 5.2 million overnight trips. The total number of nights was up by 8% to reach 37.4 million in 2017. Spend was unchanged from the levels achieved in 2015.

Kent also experienced growth between 2015 and 2017. Trips were up 4%, nights per trip went up 11% and expenditure was also up by 4%.

The International Passenger Survey (IPS) is conducted by 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 2017 was around 35,628.

Day visitors

During 2017, GB residents took a total of 1.5 billion tourism day trip to destinations in England. Around £51 billion was spent during these trips. At national level, the volume of day trips was down by 1% and the expenditure levels were unchanged between 2015 and 2017.

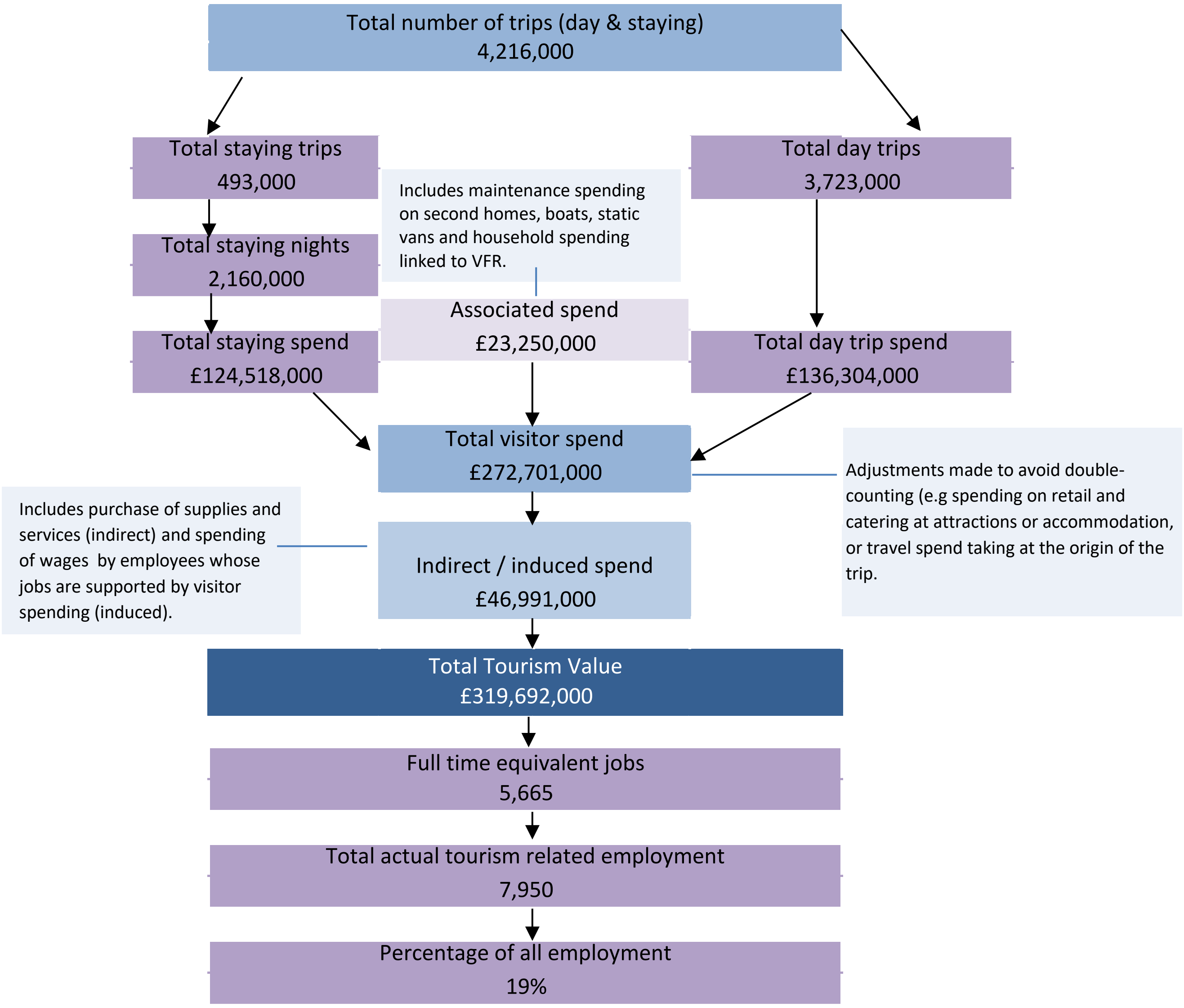
The volume and value of tourism day visits in the South East of England increased by 4% between 2015 and 2017, from 221 million to 230 million. Expenditure levels were up by 5% to £7.4 billion in 2017.

The results for Kent are based on a combination of results from the GB Day Visitor Survey, admissions data from the Visits to Visitor Attractions Survey, the ALVA (Association of Leading Visitor Attractions) Survey and attractions visitor numbers from the Visit Kent Business Barometer.

The GB Day Visitor Survey shows a 15% increase in volume of trips to Kent between 2015 and 2017 and a 20% increase in value for the same period. However, data from the Visits to Visitor Attractions Survey looking at attractions based in Kent shows that the admissions to attractions were up by 5% between 2015 and 2017 and admission charges were also up by 5%. Results from the Visit Kent Business Barometer report an increase of 4% in visitor numbers for the same period.

Based on these results the model assumes that the volume of day trips was up 8% between 2015 and 2017 and expenditure up by 9%.

Economic Impact of Tourism – Headline Figures Thanet - 2017 Results



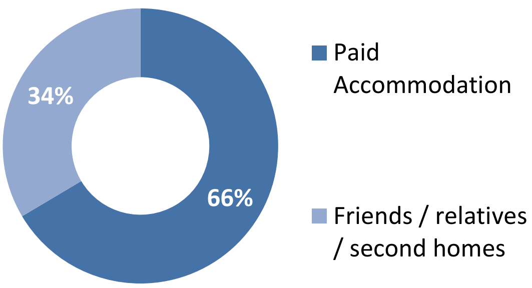
Economic Impact of Tourism – Year on year comparisons **Thanet**

Day Trips	**2015**	**2017**	**Annual variation**
Day trips Volume	3,386,900	3,723,000	9.9%
Day trips Value	£119,391,494	£136,304,000	14.2%
Overnight trips			
Number of trips	494,000	493,000	-0.2%
Number of nights	2,059,000	2,160,000	4.9%
Trip value	£122,087,000	£124,518,000	2.0%
Total Value	£292,877,400	£319,692,000	9.2%
Actual Jobs	7,312	7,950	8.7%

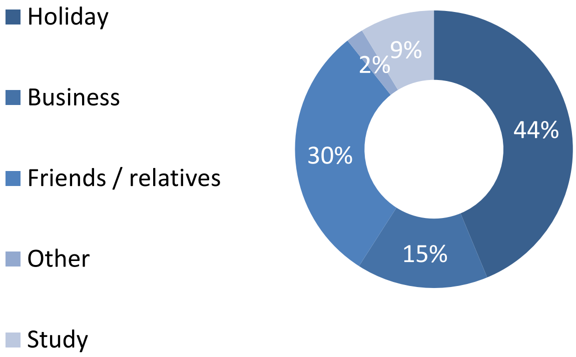
Thanet	**2015**	**2017**	**Variation**
Average length stay (nights x trip)	4.17	4.38	5.1%
Spend x overnight trip	£ 247.14	£ 252.57	2.2%
Spend x night	£ 59.29	£ 57.65	-2.8%
Spend x day trip	£ 35.25	£ 36.61	3.9%

Economic Impact of Tourism – Headline Figures   Thanet - 2017 Results

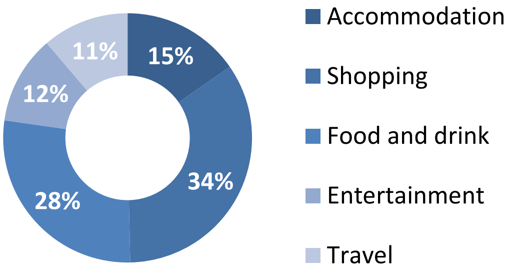
Trips by type of accommodation



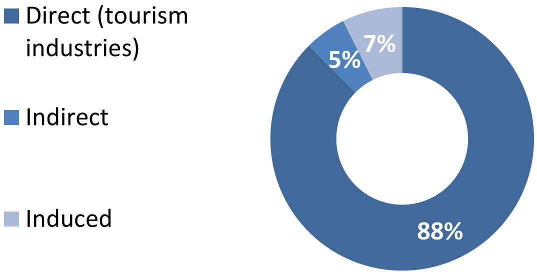
Trips by Purpose



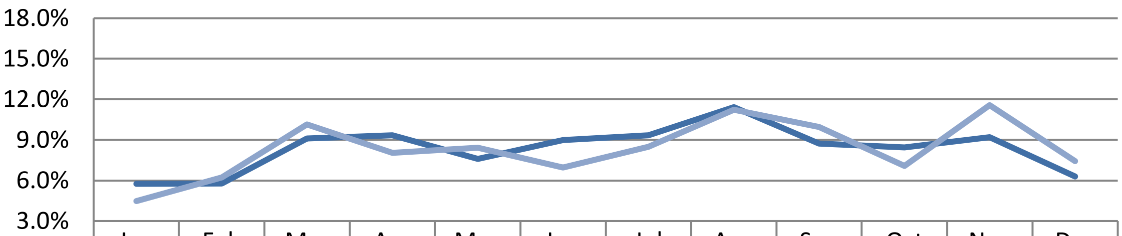
Breakdown of expenditure



Type of employment

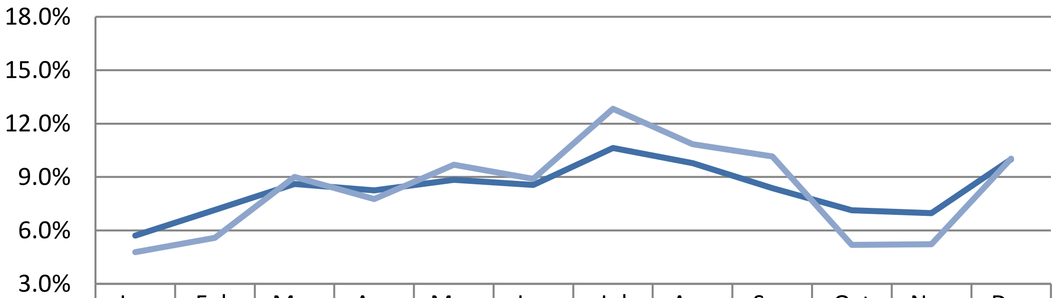


Seasonality - Day visitors (County level)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	5.8%	5.8%	9.1%	9.3%	7.6%	9.0%	9.3%	11.4%	8.7%	8.5%	9.2%	6.3%
Day spend	4.5%	6.2%	10.2%	8.0%	8.4%	7.0%	8.5%	11.2%	9.9%	7.1%	11.6%	7.4%

Seasonality - Overnight visitors (County level)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	5.7%	7.2%	8.6%	8.3%	8.8%	8.6%	10.6%	9.8%	8.4%	7.1%	7.0%	10.0%
Overnight spend	4.8%	5.6%	9.0%	7.8%	9.7%	8.9%	12.8%	10.8%	10.2%	5.2%	5.2%	10.0%

Volume of Tourism

Staying visits in the county context

Staying trips in the county context	Domestic trips ('000)	Overseas trips ('000)
Ashford	281	110
Canterbury	461	186
Dartford	135	46
Dover	336	86
Gravesham	149	40
Maidstone	288	83
Medway	423	101
Sevenoaks	168	63
Folkestone & Hythe	395	75
Swale	355	43
Thanet	345	148
Tonbridge&Malling	193	49
Tunbridge Wells	246	65
Kent	**3,775**	**1,095**

Staying nights in the county context	Domestic nights ('000)	Overseas nights ('000)
Ashford	753	504
Canterbury	1,411	1,322
Dartford	386	239
Dover	952	487
Gravesham	389	243
Maidstone	746	525
Medway	1,251	686
Sevenoaks	434	353
Folkestone & Hythe	991	434
Swale	1,244	324
Thanet	1,040	1,120
Tonbridge&Malling	553	300
Tunbridge Wells	748	446
Kent	**10,898**	**6,983**

Expenditure in the county context	Domestic spend (millions)	Overseas spend (millions)
Ashford	£44	£29
Canterbury	£76	£73
Dartford	£19	£12
Dover	£63	£26
Gravesham	£16	£10
Maidstone	£38	£28
Medway	£60	£30
Sevenoaks	£23	£18
Folkestone & Hythe	£62	£20
Swale	£45	£12
Thanet	£54	£70
Tonbridge&Malling	£26	£13
Tunbridge Wells	£41	£21
Kent	**£568**	**£361**

Staying Visitors - Accommodation Type

Thanet - 2017 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	132,000	38%	73,000	50%	205,000	42%
Self catering	16,000	5%	11,000	7%	27,000	5%
Camping	23,000	7%	5,000	4%	28,000	6%
Static caravans	35,000	10%	0	0%	35,000	7%
Group/campus	2,000	1%	9,000	6%	11,000	2%
Paying guest	0	0%	0	0%	0	0%
Second homes	8,000	2%	1,000	1%	9,000	2%
Boat moorings	6,000	2%	0	0%	6,000	1%
Other	3,000	1%	12,000	8%	15,000	3%
Friends & relatives	120,000	34%	36,000	24%	156,000	32%
Total 2017	**345,000**		**148,000**		**493,000**	
Comparison 2015	**351,000**		**143,000**		**494,000**	
Difference	**-2%**		**3%**		**0%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	302,000	29%	328,000	29%	630,000	29%
Self catering	85,000	8%	86,000	8%	171,000	8%
Camping	86,000	8%	44,000	4%	130,000	6%
Static caravans	156,000	15%	0	0%	156,000	7%
Group/campus	8,000	1%	84,000	8%	92,000	4%
Paying guest	0	0%	0	0%	0	0%
Second homes	27,000	3%	2,000	0%	29,000	1%
Boat moorings	28,000	3%	0	0%	28,000	1%
Other	9,000	1%	37,000	3%	46,000	2%
Friends & relatives	339,000	33%	539,000	48%	878,000	42%
Total 2017	**1,040,000**		**1,120,000**		**2,160,000**	
Comparison 2015	**993,000**		**1,066,000**		**2,059,000**	
Difference	**5%**		**5%**		**5%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£31,328,000	58%	£39,229,000	56%	£70,557,000	57%
Self catering	£4,356,000	8%	£3,563,000	5%	£7,919,000	6%
Camping	£2,191,000	4%	£1,947,000	3%	£4,138,000	3%
Static caravans	£4,097,000	8%	£0	0%	£4,097,000	3%
Group/campus	£82,000	0%	£5,012,000	7%	£5,094,000	4%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£483,000	1%	£98,000	0%	£581,000	0%
Boat moorings	£500,000	1%	£0	0%	£500,000	0%
Other	£497,000	1%	£749,000	1%	£1,246,000	1%
Friends & relatives	£10,588,000	19%	£19,798,000	28%	£30,386,000	25%
Total 2017	**£54,122,000**		**£70,396,000**		**£124,518,000**	
Comparison 2015	**£54,237,000**		**£67,850,000**		**£122,087,000**	
Difference	**0%**		**4%**		**2%**	

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

Thanet - 2017 Results

Trips by Purpose

	UK		Overseas		Total	
Holiday	167,000	48%	47,000	32%	214,000	44%
Business	48,000	14%	28,000	18%	76,000	15%
Friends & relatives	124,000	36%	26,000	18%	150,000	30%
Other	6,000	2%	4,000	3%	10,000	2%
Study	0	0%	43,000	29%	43,000	9%
Total 2017	**345,000**		**148,000**		**493,000**	
Comparison 2015	**351,000**		**143,000**		**494,000**	
Difference	**-2%**		**3%**		**0%**	

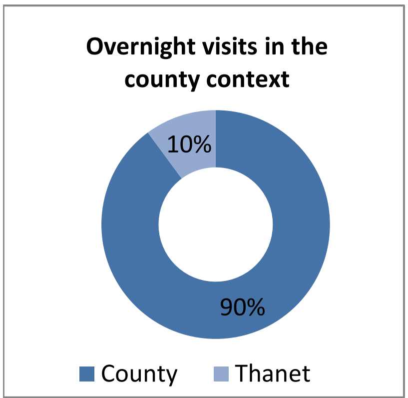
Nights by Purpose

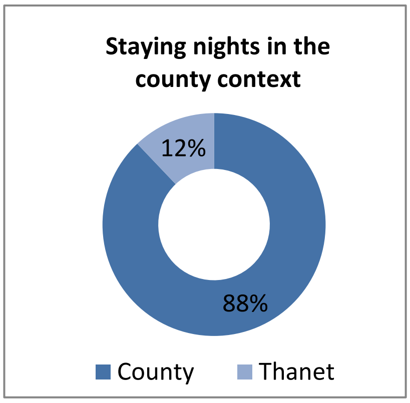
	UK		Overseas		Total	
Holiday	601,000	58%	244,000	22%	845,000	39%
Business	164,000	16%	72,000	6%	236,000	11%
Friends & relatives	258,000	25%	226,000	20%	484,000	23%
Other	17,000	2%	27,000	2%	44,000	2%
Study	0	0%	551,000	49%	551,000	26%
Total 2017	**1,040,000**		**1,120,000**		**2,160,000**	
Comparison 2015	**993,000**		**1,066,000**		**2,059,000**	
Difference	**5%**		**5%**		**5%**	

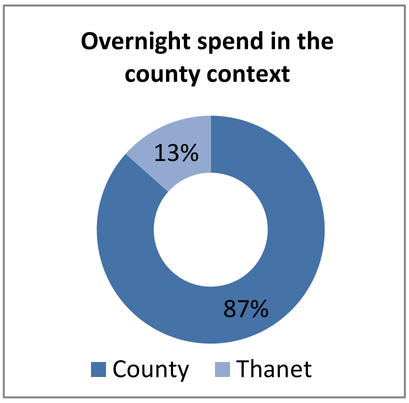
Spend by Purpose

	UK		Overseas		Total	
Holiday	£28,143,000	52%	£17,211,000	25%	£45,354,000	36%
Business	£16,237,000	30%	£5,040,000	7%	£21,277,000	17%
Friends & relatives	£9,201,000	17%	£6,953,000	10%	£16,154,000	13%
Other	£541,000	1%	£2,265,000	3%	£2,806,000	2%
Study	£0	0%	£38,927,000	55%	£38,927,000	31%
Total 2017	**£54,122,000**		**£70,396,000**		**£124,518,000**	
Comparison 2015	**£54,237,000**		**£67,850,000**		**£122,087,000**	
Difference	**0%**		**4%**		**2%**	

Proportion of staying visits in the county context







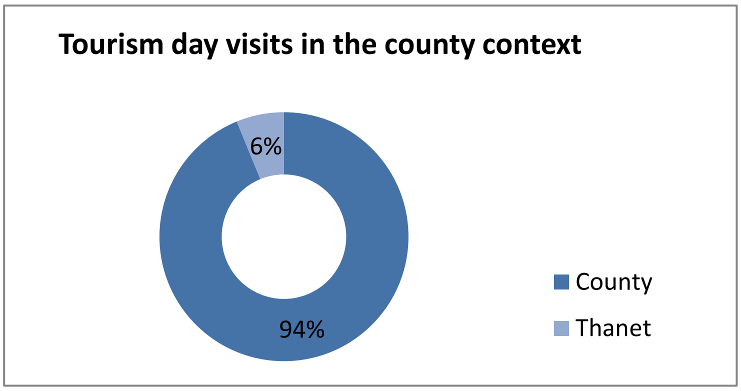
Day Visitors

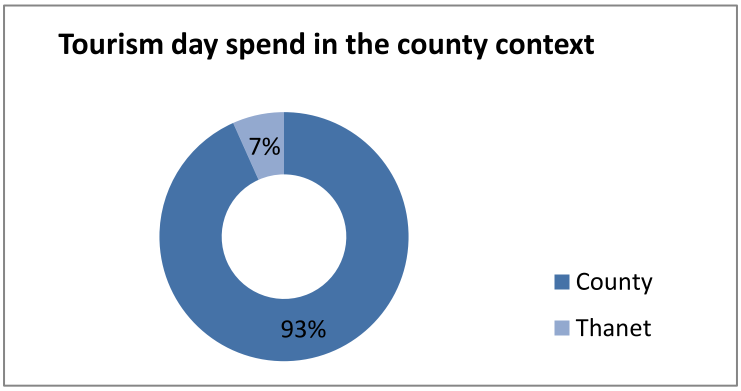
Total Volume and Value of Day Trips

		Trips	Spend
Total	**2017**	**3,723,000**	**£136,304,000**
Comparison	2015	3,386,900	£119,391,494
Difference		10%	14%

Day Visitors in the county context

District	Day Visits (millions)	Day Visit Spend (millions)
Ashford	4.0	£141.4
Canterbury	7.1	£238.1
Dartford	10.6	£404.7
Dover	4.2	£127.0
Gravesham	1.8	£52.6
Maidstone	4.1	£135.7
Medway	4.4	£144.5
Sevenoaks	4.0	£140.4
Folkestone & Hythe	4.3	£127.7
Swale	4.7	£141.4
Thanet	3.7	£136.3
Tonbridge&Malling	2.8	£89.6
Tunbridge Wells	4.3	£157.4
Kent	**60.1**	**£2,036.7**





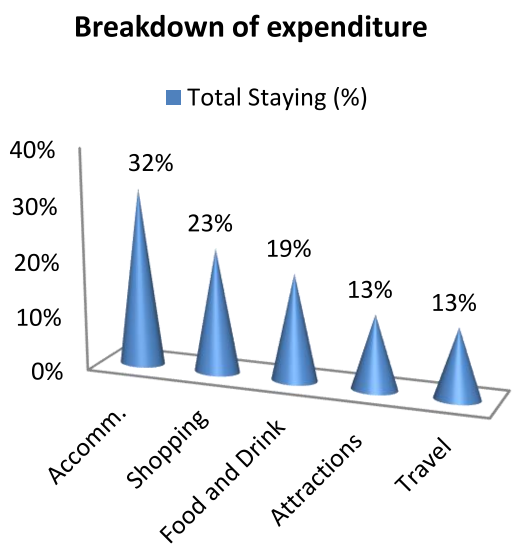
Value of Tourism

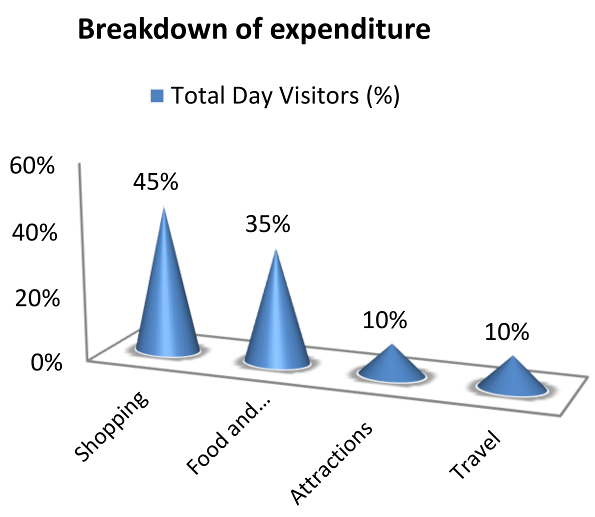
Expenditure Associated with Trips

Thanet - 2017 Results

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£19,829,000	£6,641,000	£11,715,000	£5,464,000	£10,473,000	£54,122,000
Overseas tourists		£20,192,000	£21,381,000	£12,294,000	£11,257,000	£5,271,000	£70,396,000
Total Staying		£40,021,000	£28,022,000	£24,009,000	£16,721,000	£15,744,000	£124,518,000
Total Staying (%)		32%	23%	19%	13%	13%	100%
Total Day Visitors		£0	£61,473,000	£47,979,000	£13,221,000	£13,640,000	£136,304,000
Total Day Visitors (%)		0%	45%	35%	10%	10%	100%
Total	**2017**	**£40,021,000**	**£89,495,000**	**£71,988,000**	**£29,942,000**	**£29,384,000**	**£260,831,000**
%		**15%**	**34%**	**28%**	**11%**	**11%**	**100%**
Comparison	**2015**	**£39,622,000**	**£81,071,000**	**£65,272,000**	**£28,160,000**	**£27,353,000**	**£241,478,000**
Difference		**1%**	**10%**	**10%**	**6%**	**7%**	**8%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£912,000	£1,200,000	£210,000	£20,928,000	£23,250,000

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 and personal visits.

Direct Turnover Derived From Trip

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	£40,636,000	£960,000	£41,596,000
Retail	£27,801,000	£60,858,000	£88,659,000
Catering	£23,359,000	£46,540,000	£69,899,000
Attractions	£17,313,000	£14,316,000	£31,629,000
Transport	£9,490,000	£8,178,000	£17,668,000
Non-trip spend	£23,250,000	£0	£23,250,000
Total Direct 2017	**£141,849,000**	**£130,852,000**	**£272,701,000**
Comparison 2015	**£135,189,000**	**£114,616,000**	**£249,805,400**
Difference	**5%**	**14%**	**9%**

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	£8,590,000	£7,102,000	£15,692,000
Non trip spending	£3,488,000	£0	£3,488,000
Income induced	£15,415,000	£12,396,000	£27,811,000
Total 2017	**£27,493,000**	**£19,498,000**	**£46,991,000**
Comparison 2015	**£25,993,000**	**£17,079,000**	**£43,072,000**
Difference	**6%**	**14%**	**9%**

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	£141,849,000	£130,852,000	£272,701,000
Indirect	£27,493,000	£19,498,000	£46,991,000
Total Value 2017	**£169,342,000**	**£150,350,000**	**£319,692,000**
Comparison 2015	**£161,182,400**	**£131,695,000**	**£292,877,400**
Difference	**5%**	**14%**	**9%**

Employment

Employment   Thanet - 2017 Results

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 visitor spending. A new Full Time Equivalent tourism job is created with every £54,000 increase in tourism revenue.

Direct employment

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Accommodation		949	36%	22	1%	972	20%
Retailing		367	14%	804	37%	1,171	25%
Catering		517	20%	1,031	48%	1,548	32%
Entertainment		256	10%	212	10%	468	10%
Transport		110	4%	95	4%	205	4%
Non-trip spend		431	16%	0	0%	431	9%
Total FTE	**2017**	**2,631**		**2,164**		**4,795**	
Comparison	**2015**	**2,509**		**1,895**		**4,405**	
Difference		**5%**		**14%**		**9%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		1,405	37%	33	1%	1,438	21%
Retailing		551	15%	1,206	38%	1,757	25%
Catering		776	21%	1,546	48%	2,322	33%
Entertainment		361	10%	299	9%	660	9%
Transport		155	4%	134	4%	289	4%
Non-trip spend		491	13%	0	0%	491	7%
Total Actual	**2017**	**3,740**		**3,218**		**6,957**	
Comparison	**2015**	**3,584**		**2,819**		**6,403**	
Difference		**4%**		**14%**		**9%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		224	132	355
Induced jobs		285	230	515
Total FTE	**2017**	**509**	**361**	**870**
Comparison	**2015**	**481**	**316**	**798**
Difference		**6%**	**14%**	**9%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		255	150	405
Induced jobs		325	262	587
Total Actual	**2017**	**580**	**412**	**992**
Comparison	**2015**	**549**	**361**	**909**
Difference		**6%**	**14%**	**9%**

Total Tourism Jobs

Thanet - 2017 Results

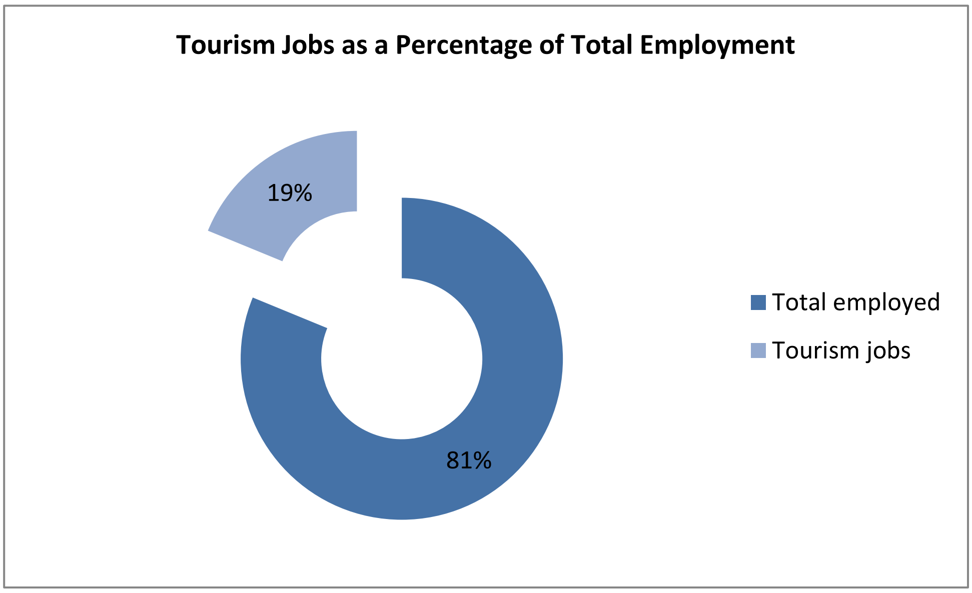
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		2,631	84%	2,164	86%	4,795	85%
Indirect		224	7%	132	5%	355	6%
Induced		285	9%	230	9%	515	9%
Total FTE	**2017**	**3,140**		**2,525**		**5,665**	
Comparison	2015	2,990		2,212		5,202	
Difference		5%		14%		9%	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		3,740	87%	3,218	89%	6,957	88%
Indirect		255	6%	150	4%	405	5%
Induced		325	7%	262	7%	587	7%
Total Actual	**2017**	**4,320**		**3,630**		**7,950**	
Comparison	2015	4,133		3,179		7,312	
Difference		5%		14%		9%	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		42,300	42,300	42,300
Tourism jobs		4,320	3,630	7,950
Proportion all jobs		**10%**	**9%**	**19%**
Comparison	2015	4,133	3,179	7,312
Difference		5%	14%	9%



Economic Impact of Tourism – Headline Figures **Thanet - 2017 Results**

The key 2017 results of the Economic Impact Assessment are:

4.2 million trips were undertaken in the area
3.7 million day trips
0.5 million overnight visits

2.2 million nights in the area as a result of overnight trips

£273 million spent by tourists during their visit to the area
£23 million spent on average in the local economy each month.

£125 million generated by overnight visits
£136 million generated from day trips.

£320 million spent in the local area as result of tourism, taking into account multiplier effects.

7,950 jobs supported, both for local residents from those living nearby.
6,957 tourism jobs directly supported
992 non-tourism related jobs supported linked to multiplier spend from tourism.

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- 2017 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.

Local level data for Kent EIA Reports 2017

The Cambridge Model allows for the use of local visitor related data. Local data from visitor survey and other sources is not always sufficiently detailed or available regularly enough to make the results consistent. We rely on partners to collect additional locally source data to feed into the model. We have also used data from Visit Kent's Business Barometer. The following local data has been included in the 2017 Kent results:

Dartford - Bluewater Shopping Centre **-** Bluewater attracted 28 million visitors in 2017. Only about a quarter of these visits is accounted for in the Cambridge Model, equating to about 7.8 million visits.

Dover District - Cruise Passengers data - Port of Dover received about 225,000 cruise passengers in 2017. Official statistics (DfT) suggest that about half of all passengers to Dover would be 'port calls' visits. Furthermore, cruise passengers are included at both departure and arrival if their journey begins and ends at a UK seaport. We made the following assumptions:

A total of 112,000 cruise passengers were classed as 'port call' visits and have been counted as day visitors. For the additional estimated 112,000 that departed or finished their trip in Dover we assume that most would start and finish their trip at Dover. A multiplier factor of 0.6 has been applied to avoid double counting and the additional trips have been added as extra serviced accommodation trips (67,500).

Tonbridge & Malling - Tonbridge Castle visitor numbers have rebounded recently, following a drop in performance between 2014-2016. The latest admission figures have been included in the district results.

Other anecdotal information taken into consideration was the significant growth in high-end independent cafes and restaurants in Tonbridge since 2016, now making it quite a foody destination (includes Tonbridge Old Fire Station, Beyond the Grounds, Basil, Havet, Saltwaters, Verdigris, Fuggles and Paws Cat Café). Outside of Tonbridge, Aylesford Priory attracts hundreds of thousands of visitors each year. The latest admission figures have been included in the district results.

Folkestone & Hythe District Council (previously Shepway District)

The latest admission figures for Romney Marsh Visitor Centre have been included in the district results. Folkestone Triennial 2017 - During September and October 2017 the Triennial attracted record high visitor numbers . The latest admission figures have been included in the district results.

Ashford

Annual footfall figures for the Big Cat Sanctuary in Smarden have been included.
Car park data shows that Ashford carparks saw a 2% drop in users and Tenterden a 1% drop.

Medway

Increase in the number of festivals and events (Sweeps Festival, Dickens Summer Festival, Rochester Castle concerts, Medieval Merriment, Dickensian Christmas Festival, 'The Battle of Medway' (two weeks in June 2017) with additional 200 Dutch yachts and many visitors to the two week series of events. Coach visits (2017) 22,047 coaches and assumed 114,608 visitors (assumes x54 pax per coach).

Swale

We have used selected information from the Destination Intelligence reports submitted as part of their British Destination membership and the data sharing and benchmarking research.

Thanet

Thanet Language Schools – Figures for 2017 compared to 2015 show an 11% increase in volume. Southeastern - Comparison stats for 2015 and 2017 - For travel to Margate, Broadstairs and Ramsgate only, journeys on Off-Peak products increased by 33% from April 2016 to March 2017 compared to the previous year.

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