The Economic Impact of Tourism on Calderdale 2022

Prepared by:
Tourism South East
Research Unit
40 Chamberlayne Road
Eastleigh
Hampshire
SO50 5JH

TOURISM
SOUTH EAST

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Introduction

This report, commissioned by Calderdale Council and undertaken by TSE Research, examines the volume and value of tourism and the impact of visitor expenditure on the local economy across 2022.

The study involved the application of the Cambridge Tourism Economic Impact Model or ‘Cambridge Model’; a computer-based model developed by Geoff Broom Associates and the Regional Tourist Boards of England. In its basic form, the model distributes regional activity as measured in national surveys to local areas using ‘drivers’ such as accommodation stock and occupancy which influence the distribution of tourism at a local level.

The Great Britain Day Visits Survey (GBDVS) measures the volume, value and trip characteristics of tourism day visits in Britain and the Great Britain Tourism Survey (GBTS) measures the volume and value of domestic overnight tourism trips in Britain (covering all purposes of tourism such as holidays, visits to friends and relatives and business) taken by British residents. Both of these surveys underpin the results from the Cambridge Economic Impact Model results.

From 2021 some definition and survey methodology changes were introduced to both surveys by VisitBritain, meaning that results are not directly comparable with data published for 2019 and previous years. The data in this report should be seen as a new baseline from which to work.

Some of the changes to the surveys are:

- Definitions of overnight trips and day visits were improved and tightened
- Data collection method changed from ‘face-to-face’ to ‘online’
- Methodology changes such as joining the surveys and numerous questionnaire improvements
- Simplification of weighting criteria

In addition, due to the COVID-19 pandemic, fieldwork was paused and did not begin again until April 2021. Even when surveying recommenced, the pandemic had seriously impacted people’s willingness to undertake tourism day or overnight visits which may therefore have an impact on survey results.

For 2019 and previous years, sub-regional results were published using a three-year rolling average to accumulate more robust base sizes for the smaller areas and to have constant comparable data. The latest data collected and released by VisitBritain for both surveys runs from the start of April 2021 to the end of March 2023 covering a 24-month period. This data has been averaged to create a 12-month average figure that is being classed as ‘2022 average’. Following discussions with VisitBritain we feel that it is important for us to advise that any results directly quoting substantiated data for the full 2021 calendar year does not exist, since reporting re-started from April 2021 and therefore does not hold any plausible statistical value.

Once a full year of data has been collected for 2023 then the average will be recalculated to create a two-year rolling average covering January 2022 to December 2023. Once the data for 2024 has been collected then the results will go back to being reported as three-year rolling averages.

National and regional results

Trips by domestic overnight visitors

	Yorkshire and The Humber		England	
	2022	2019	2022	2019
Trips	9,600,000	9,600,000	98,330,000	99,100,000
Nights	29,620,000	27,500,000	307,690,000	290,300,000
Spend	£2.328m	£1.690m	£24.656m	£19.448m

Trips by overseas overnight visitors

	Yorkshire and The Humber		England	
	2022	2019	2022	2019
Trips	1,058,000	1,380,000	22,756,000	36,110,000
Nights	8,875,000	11,110,000	226,265,000	252,360,000
Spend	£533.00m	£637.37m	£22.637m	£24.780bn

Trips by day visitors

	Yorkshire and The Humber		England	
	2022	2019	2022	2019
Trips	218,100,000	141,000,000	2,205,520,000	1,390,000,000
Spend	£7.428m	£6.429m	£74.067m	£56.500m

Average annual room occupancy / Annual visits to attractions

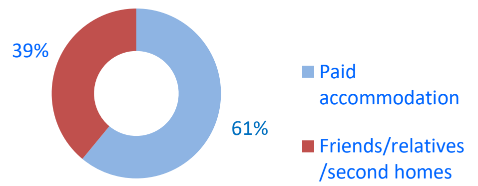
	Average annual room occupancy: England		Annual visits to attractions: England	
2022	73.4%		166,520,000,000	
2021	51.5%		117,170,000,000	
2019	77.7%		257,520,000,000	

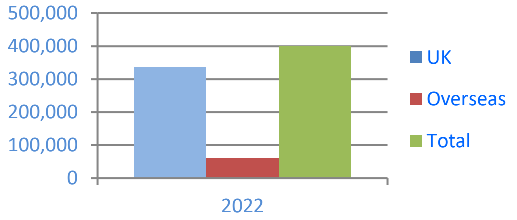
Overnight trips by accommodation

Number of staying trips by accommodation stayed at

	UK	%	Overseas	%	Total	%
Serviced	177,000	52%	36,000	59%	213,000	53%
Non-Serviced	15,000	4%	3,000	5%	18,000	5%
Group / campus	5,000	1%	1,000	2%	6,000	2%
Second homes	9,000	3%	1,000	2%	10,000	3%
Boat moorings[1]	4,000	1%	0	0%	4,000	1%
Other	6,000	2%	0	0%	6,000	2%
SFR	123,000	36%	19,000	31%	142,000	36%
Total 2022	**338,000**		**61,000**		**399,000**	

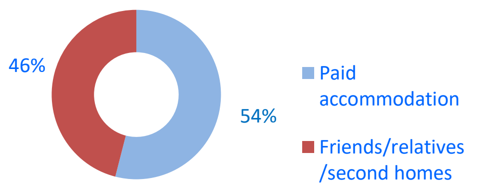
SFR = staying with friends/relatives

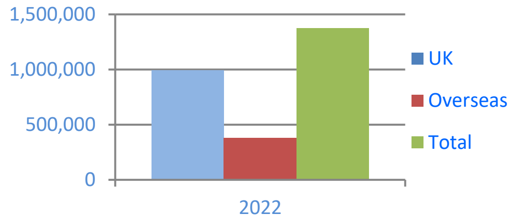




Number of nights by accommodation stayed at

	UK	%	Overseas	%	Total	%
Serviced	387,000	39%	83,000	22%	470,000	34%
Non-Serviced	139,000	14%	7,000	2%	184,000	13%
Group / campus	11,000	1%	27,000	7%	38,000	3%
Second homes	25,000	3%	0	0%	25,000	2%
Boat moorings	25,000	3%	0	0%	25,000	2%
Other	18,000	2%	0	0%	18,000	1%
SFR	389,000	39%	219,000	58%	608,000	44%
Total 2022	**993,000**		**379,000**		**1,372,000**	



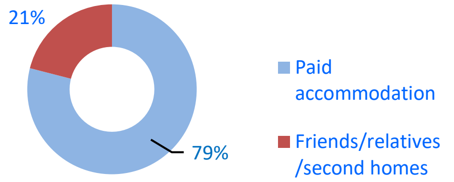


[1] *Information on boat use is not available for overseas tourists.*

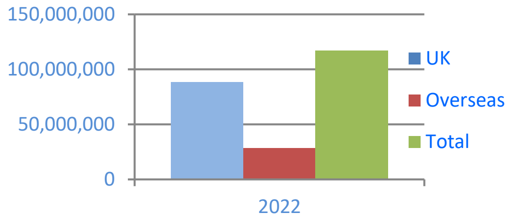
Spend by accommodation stayed at

	UK	%	Overseas	%	Total	%
Serviced	£65,055,000	73%	£16,350,000	57%	£81,405,000	70%
Non-Serviced	£2,854,000	3%	£4,088,000	14%	£6,942,000	6%
Group / campus	£672,000	1%	£0	0%	£672,000	1%
Second homes	£1,398,000	2%	£0	0%	£1,398,000	1%
Boat moorings	£1,280,000	1%	£254,000	1%	£1,534,000	1%
Other	£1,534,000	2%	£0	0%	£1,534,000	1%
SFR	£15,775,000	18%	£7,765,000	27%	£23,540,000	20%
Total 2022	**£88,568,000**		**£28,457,000**		**£117,025,000**	

Overnight spend by type of accommodation



Overnight spend 2022

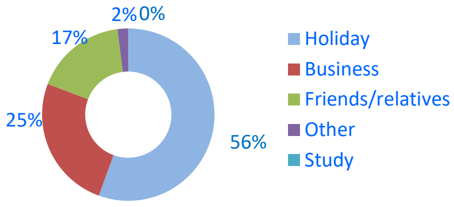


Overnight trips by purpose

Trips by purpose

	UK		Overseas		Total	
Holiday	194,000	57%	27,000	44%	221,000	56%
Business	87,000	26%	13,000	21%	100,000	25%
Visits to friends/relatives	50,000	15%	18,000	30%	68,000	17%
Other	7,000	2%	2,000	3%	9,000	2%
Study	0	0%	1,000	2%	1,000	0%
Total	**338,000**		**61,000**		**399,000**	

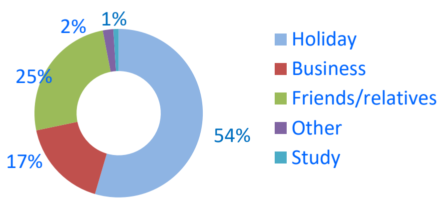
Overnight trips by purpose



Nights by purpose

	UK		Overseas		Total	
Holiday	601,000	61%	138,000	36%	739,000	54%
Business	211,000	21%	28,000	7%	239,000	17%
Visits to friends/relatives	167,000	17%	180,000	47%	347,000	25%
Other	15,000	2%	14,000	4%	29,000	2%
Study	0	0%	19,000	5%	19,000	1%
Total	**993,000**		**379,000**		**1,372,000**	

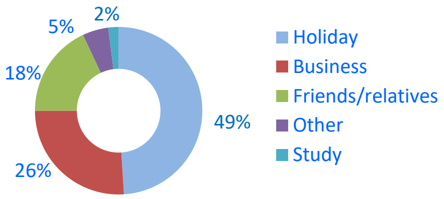
Staying nights by purpose



Spend by purpose

	UK		Overseas		Total	
Holiday	£44,853,000	51%	£12,831,000	45%	£57,684,000	49%
Business	£25,514,000	29%	£5,032,000	18%	£30,546,000	26%
Visits to friends/relatives	£13,453,000	15%	£7,544,000	27%	£20,997,000	18%
Other	£4,748,000	5%	£1,239,000	4%	£5,987,000	5%
Study	£0	0%	£1,812,000	6%	£1,812,000	2%
Total	**£88,568,000**		**£28,457,000**		**£117,025,000**	

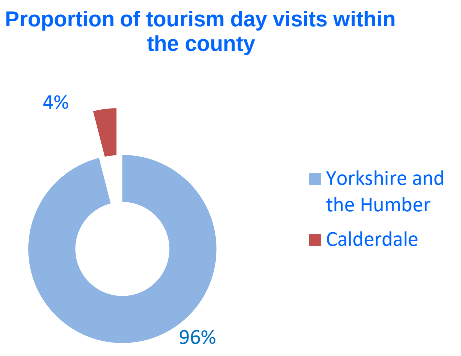
Overnight spend by purpose

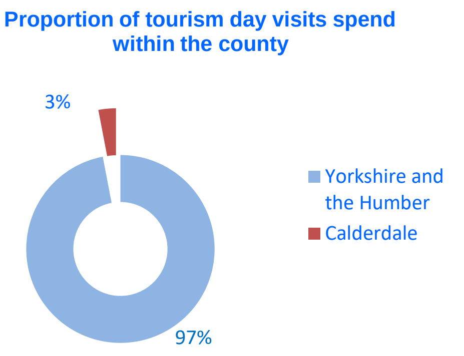


Tourism day trips

Tourism Day trips and spend

	Trips	Spend
Total 2022	**7,911,000**	**£218,236,000**



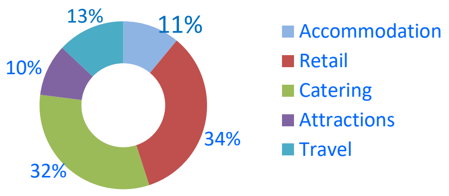


Value of tourism

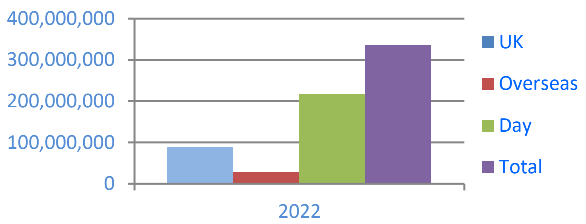
Sector breakdown of trip expenditure

	Domestic		Overseas		Day		Total	
Accommodation	£28,212,000	32%	£8,722,000	31%	£0	0%	£36,934,000	11%
Retail	£11,408,000	13%	£7,827,000	28%	£94,041,000	43%	£113,276,000	34%
Catering	£20,861,000	24%	£6,257,000	22%	£81,728,000	37%	£108,846,000	32%
Attractions	£7,760,000	9%	£2,876,000	10%	£21,653,000	10%	£32,289,000	10%
Travel	£20,327,000	23%	£2,776,000	10%	£20,813,000	10%	£43,916,000	13%
Total 2022	**£88,568,000**		**£28,458,000**		**£218,235,000**		**£335,261,000**	
Distribution	**26%**		**8%**		**65%**			

Breakdown of trip expenditure



Trip expenditure 2022



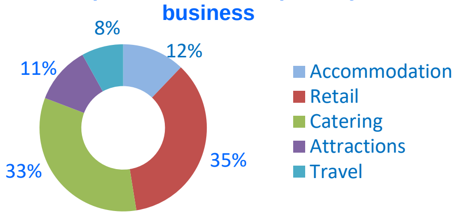
Breakdown of other trip related expenditure

Second homes	Boats	Static caravans	Friends and relatives	**Total 2022**
£164,000	£120,000	£0	£13,432,000	**£13,716,000**

Businesses in receipt of visitor spend on trip

	Staying tourists		Day visitors		Total	
Accommodation	£37,476,000	35%	£1,635,000	1%	£39,111,000	12%
Retail	£19,043,000	18%	£93,101,000	44%	£112,144,000	35%
Catering	£26,304,000	24%	£79,277,000	38%	£105,581,000	33%
Attraction/entertainment	£11,100,000	10%	£23,411,000	11%	£34,511,000	11%
Transport	£13,861,000	13%	£12,488,000	6%	£26,349,000	8%
TOTAL(1)	£107,784,000		£209,912,000		£317,696,000	
Other non trip related expenditure(2)	£13,716,000		£0		£13,716,000	
Total direct 2022	**£121,500,000**		**£209,912,000**		**£331,412,000**	

Proportion of visitor spend by business



Income for local business generated by trip expenditure

Direct	Supplier & income induced	**Total 2022**
£331,412,000	£100,524,000	**£431,936,000**

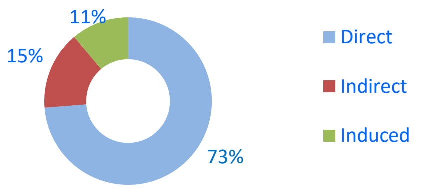
(1) Adjustments have been made to visitor expenditure by sector to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. A small proportion of day trip spend will also fall into 'Accommodation' where day visitors have eaten in restaurants/bars of hotels. Furthermore, it is assumed that 40% of travel expenditure occurs outside the destination
(2) Apart from the spending associated with the individual trips, additional spending by non-visitors, e.g. friends and relatives with whom the visitor is staying with will also take place. Moreover, owners of second homes/boats will spend some money on maintenance, repair. Data is only available for additional expenditure made related to overnight trips.

Employment

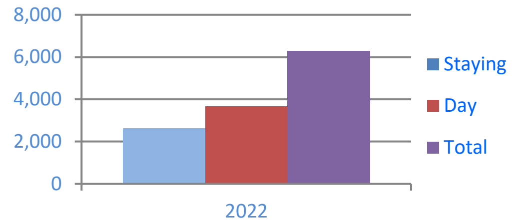
Local employment supported by the visitor economy - Full time equivalent jobs (FTE)

	Staying Visitor		Day Visitor		Total	
Direct	1,801	68%	2,824	77%	4,625	73%
Indirect	542	21%	433	12%	975	15%
Induced	293	11%	407	11%	700	11%
Total FTE 2022	**2,636**		**3,664**		**6,300**	

Proportion of FTE jobs



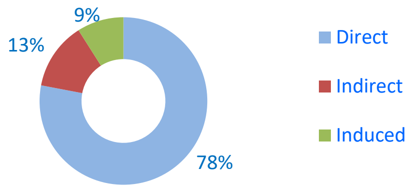
Number of FTE jobs 2022



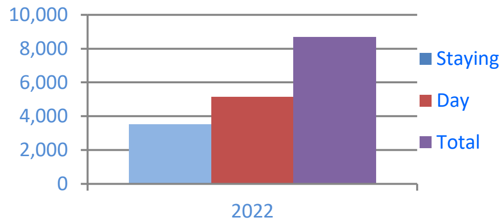
Local employment supported by the visitor economy - Estimated actual jobs

	Staying Visitor		Day Visitor		Total	
Direct	2,582	73%	4,194	81%	6,776	78%
Indirect	618	17%	494	10%	1,112	13%
Induced	334	10%	464	9%	798	9%
Total estimated actual jobs 2022	**3,534**		**5,152**		**8,686**	

Proportion of estimated actual jobs



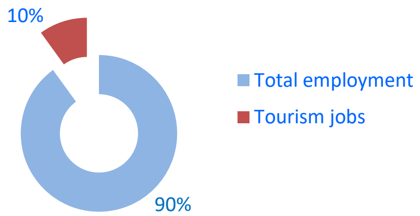
Number of estimated actual jobs 2022



Proportion of total jobs supported across all sectors

	Staying Visitor	Day Visitor	Total
Total employed [3]	90,000	90,000	90,000
Tourism employment	3,534	5,152	8,686
Tourism proportion 2022	**3.9%**	**5.7%**	**9.6%**

Tourism jobs as a Percentage of Total Employment



[3] Total labour force is based on all employees incl. part-time (excludes government-supported trainees and HM Force and self-employment).
The information comes from the Business Register and Employment Survey (BRES) an employer survey conducted by ONS in December of each year.

Key results for 2022

- **8.31 million trips** were undertaken
- **7.91 million** day trips
- **0.40 million** overnight visits
- **1.37 million nights** in the area as a result of overnight trips
- **£335.2 million** spent by tourists during their visit to the area
- **£27.93 million** spent on average in the local economy every month
- **£218.2 million** generated from day trips
- **£117.0 million** generated by overnight visits
- **£431.9 million** spent in the local area as a result of tourism (taking into account multiplier effects)
- **8,686 jobs** supported, both for local residents and from those living nearby
- **6,776 tourism jobs** directly supported
- **1,910 non-tourism related jobs** supported (linked to multiplier spend from tourism)
- **9.6% of population** employed as a result of tourism in Calderdale

Methodology

The Cambridge Model is essentially a computer-based spreadsheet model that produces estimates from existing national and local information (e.g. accommodation stocks, inbound trips) of the level of tourism activity within a given local economy. The volume of visits is translated into economic terms by estimating the amount of spending by visitors based on their average spend per trip. In turn, the impact of that spending can be translated to estimate the effects in terms of business turnover and jobs.

The Cambridge Model uses a range of sources including:

- Great Britain Tourism Survey (GBTS) – information on tourism activity by GB residents
- International Passenger Survey (IPS) – information on overseas visitors to the United Kingdom
- Great Britain Day Visits Survey (GBDVS) – information on day visits lasting more than 3 hours and taken on an irregular basis
- Visits to Attractions Survey – annual recording of visitor numbers to free and paid attractions in England
- Annual Survey of Hours and Earnings (ASHE) – contains UK data on employees earnings
- Data on employment updated annually by the Office for National Statistics
- Population estimates updated annually by the Office for National Statistics based on the Census of Population 2011
- Selected data on the countryside and coast, including national designations and length of coastline (where relevant)
- Known local accommodation stock held by Tourism South East

Limitations of the Model

The model in its basic form relies on using information from a range of sources outlined above. The methodology and accuracy of these sources varies, and therefore the estimates can only be regarded as indicative of the scale and importance of visitor activity in the local area. Thus, the Model cannot take account of any leakage of expenditure in and out of the local area from tourists taking day trips in and out of the local area in which they are staying. While it is assumed that these may broadly balance each other in many areas, there will be an underestimate in relation to overseas day visits from holiday accommodation in London to locations receiving significant numbers from that source. Similarly, there is no information in the Great Britain Day Visits Survey with regard to business day trips.

Rounding

All figures used in the report are rounded and therefore there may be a slight difference between totals and subtotals in some of the tables.

Staying visits

The GBTS provides information on the total number of trips both nationally and regionally and the relative proportions of visitors using different types of accommodation taken by domestic visitors. 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 and country as a whole.

Day visits

Information on day trips at regional and national level is available from the Great Britain Day Visits 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 trips taken on irregular basis lasting more than 3 hours.

VFR trips

VFR trips are defined as a visit where the main purpose is visiting friends and relatives. Whilst many trips to visit friends and relatives will be accommodated in the homes of these friends/ relatives (SFR), some will make use of other forms of accommodation. It should be also noted that other forms of trip, for instance for holiday or business purposes may stay with friends and relatives rather than in commercial accommodation.

England Occupancy Survey (EOS)

Every month the England Occupancy Survey measures bedroom and bedspace occupancy across the serviced accommodation sector. This includes mostly hotels, with a very small proportion of serviced apartments and larger B&Bs and guesthouses. Since June 2017, across England, the survey has been undertaken by STR on behalf of Visit England. The data is collected using a syndicated panel of more than 3,000 hotels and accommodation providers who are asked to complete a data form each month, giving details of their nightly occupancy. The data submitted is analysed to produce monthly occupancy rates for the whole of the area and for specific categories of type, size, location etc.

'Other' expenditure

Apart from the spending associated with the individual trips, additional spending by non-visitors, e.g. friends and relatives with whom the visitor is visiting and/or staying with will also take place. Moreover, owners of second homes/boats will spend some money on maintenance, repair.

Tourism expenditure impact

Multipliers are used to estimate the economic impact of visitor expenditure. Visitor expenditure produces three effects. Direct effects are changes in the business sector directly receiving visitor expenditure. For instance, visitors staying in a hotel will directly increase revenue and the number of jobs in the hotel sector. Indirect effects are the changes in supplier businesses. For example, these indirect effects would be hotels purchasing more linen from local suppliers as a result of increased business. Induced effects are changes in local economic activity resulting from household spending. For instance, employees of the hotel and linen supplier spend their wages in the local area, resulting in more sales, income and jobs in the area.

New Earnings Survey

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.

Employment

For the purposes of the Model, a full-time equivalent job (FTE) is defined by the average annual salary plus employment costs in the sector concerned. Many jobs are seasonal or part-time in their nature in the tourism sector, so an adjustment is made to calculate the actual number of jobs from the number of FTEs. The adjustment made is based on the findings of surveys of tourism related businesses, and national employment surveys and these are known as **actual jobs**.

Direct jobs are those jobs that are directly generated in those local businesses in which visitors spend money, i.e. hotels, catering establishments. Whilst **indirect jobs are j**obs created locally due to the purchases of goods and services by businesses benefiting from visitor expenditure, i.e. jobs with local suppliers. **Induced jobs** are jobs created throughout the local economy because employees employed due to visitor expenditure spend their wages locally on goods and services such as food, clothing and housing.