Commissioned by:

Visit Herts

Economic Impact of Tourism

Hertfordshire - 2023 Results

Produced by:

Destination Research
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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 2023 and provides comparative data against the previously published data for 2021, as well as providing headline comparisons against 2022 and 2019 in order to monitor the recovery following the COVID-19 pandemic.

The Cambridge Model is a constantly evolving product. During the pandemic, all data collection for the key national tourism surveys used in the model ceased. This was followed with a change in the way domestic and overseas tourism statistics were captured. Data collection for domestic tourism moved from two surveys, one for day visits (GBDVS) and one for overnight stays (GBTS) based on face-to-face interviewing, to a new combined online survey, collecting data on both domestic overnight trips as well as domestic day trips. The revised methodology applied to data for 2023 was also applied to previously published data for 2022, the only other comparative full year of new data now available. Please note that while the methodology for national 2021 data may differ due to the pandemic and pauses in data collection, this does not impact the validity of the results and please refer to the 2021 report for additional information and context.

Responding to these changes, we adopted a hybrid data approach with a two-stage evaluation process. First, the Cambridge Model disaggregates regional tourism data into sub-regional areas, using a top-down approach. It then pairs this with bottom-up initiatives, including contextual and sector-specific data from third-party sources and detailed destination-level business performance data captured by or on behalf of our destination partners.

This evolving methodology has been pivotal in our ability to produce a dynamic and reliable picture of tourism trends throughout the pandemic years and beyond. It also ensures that our results are as timely, accurate, consistent, and comparable as they can be. Some examples of additional data sources introduced in the last 5 years are:

- Attractions data - ALVA (Association of Leading Visitor Attractions)
- Short-term rental stock and occupancy - Lighthouse / AirDNA
- Local serviced accommodation data
- Tourism business counts - Inter Departmental Business Register (IDBR)
- UK inflation data - Consumer Prices Index (CPI, CPIH), Retail Prices Index (RPI)
- UK economy forecasts - Office for Budget Responsibility: Economic and fiscal outlook
- Footfall data (town centres, large retail outlets and car parks).

Domestic Tourism

Overnights visits

The revised 2023 data shows a decline in overnight trips by 5% compared to 2022 for Britain and England (2022 was generally viewed as a particularly good post pandemic year for domestic tourism). The total overnight trip spend was down 2% for Britain and 3% for England. When taking inflation into account, the total overnight trip spend for both England and Britain was down 9%, compared to 2022.

The East of England registered 8.9 million domestic overnight trips during 2023 (down 13% from 10.3 million trips in 2022). These trips contributed a total of £2.02 billion in spend (down 9% from £2.21 billion in 2022 and down 15% in real terms, accounting for inflation).

Accommodation occupancy

East of England - Serviced Accommodation Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
2019	63%	72%	72%	74%	78%	81%	84%	79%	81%	80%	75%	67%	76%
2022	55%	70%	74%	76%	76%	82%	85%	81%	83%	80%	79%	73%	76%
2023	69%	77%	78%	80%	81%	83%	84%	81%	84%	80%	76%	71%	79%

It is possible that hotel occupancy measures overstate trips compared to previous years because of ongoing workforce shortages. Hospitality businesses' coping strategies for workforce shortages included closing on certain days or reducing the number of rooms available. This means that the number of rooms occupied could be lower while the occupancy rate was the same, due to fewer available rooms.

East of England - Self Catering Unit Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2019	51%	50%	49%	56%	55%	58%	53%	67%	55%	54%	47%	50%	54%
2023	42%	46%	44%	49%	47%	49%	53%	57%	48%	44%	39%	44%	47%

Short-term holiday rentals experienced a surge since the pandemic. However, the sector is now feeling the effects of the cost-of-living crisis, and an increasing oversupply of holiday lets. According to AirDNA, new listings for homes in the UK jumped 22% year-on-year in 2023.

Day visits

Visits to visitor attractions

Visitor Attraction Trends in England 2023 report (VisitEngland, July 2024) shows that admissions volume for participating attractions in 2023 were 11% up (196.14 million) on 2022 (176.87 million), but 28% down on 2019 (273.75 million). The sector's growth was mainly fuelled by the return of overseas visitors and an increase in school trips in 2023.

There was an 8% increase in 2023 adult admission fees but was not sufficient to absorb the rising supplier and energy costs, a general decline in staycations and the wet weather (affecting outdoor attractions).

Overall, visitors to ALVA's top 374 sites (Association of Leading Visitor Attractions) were up 19% year-on-year in 2023 to 146.6 million as the sector continues its climb back to pre-pandemic levels. Overall, current numbers are 11% down on 2019.

The East of England experienced a 6% year-on-year rise in admissions in 2023, based on the volume of visits to the same attractions. The region was least affected by the pandemic, and has been the quickest to recover, now only 4% behind 2019 levels.

The total number of visits to ALVA (Association of Leading Visitor Attractions) sites in the East of England in 2023 was 11% up on the previous year. The 2023 figures are in line with the volume of visits to the same attractions in 2019.

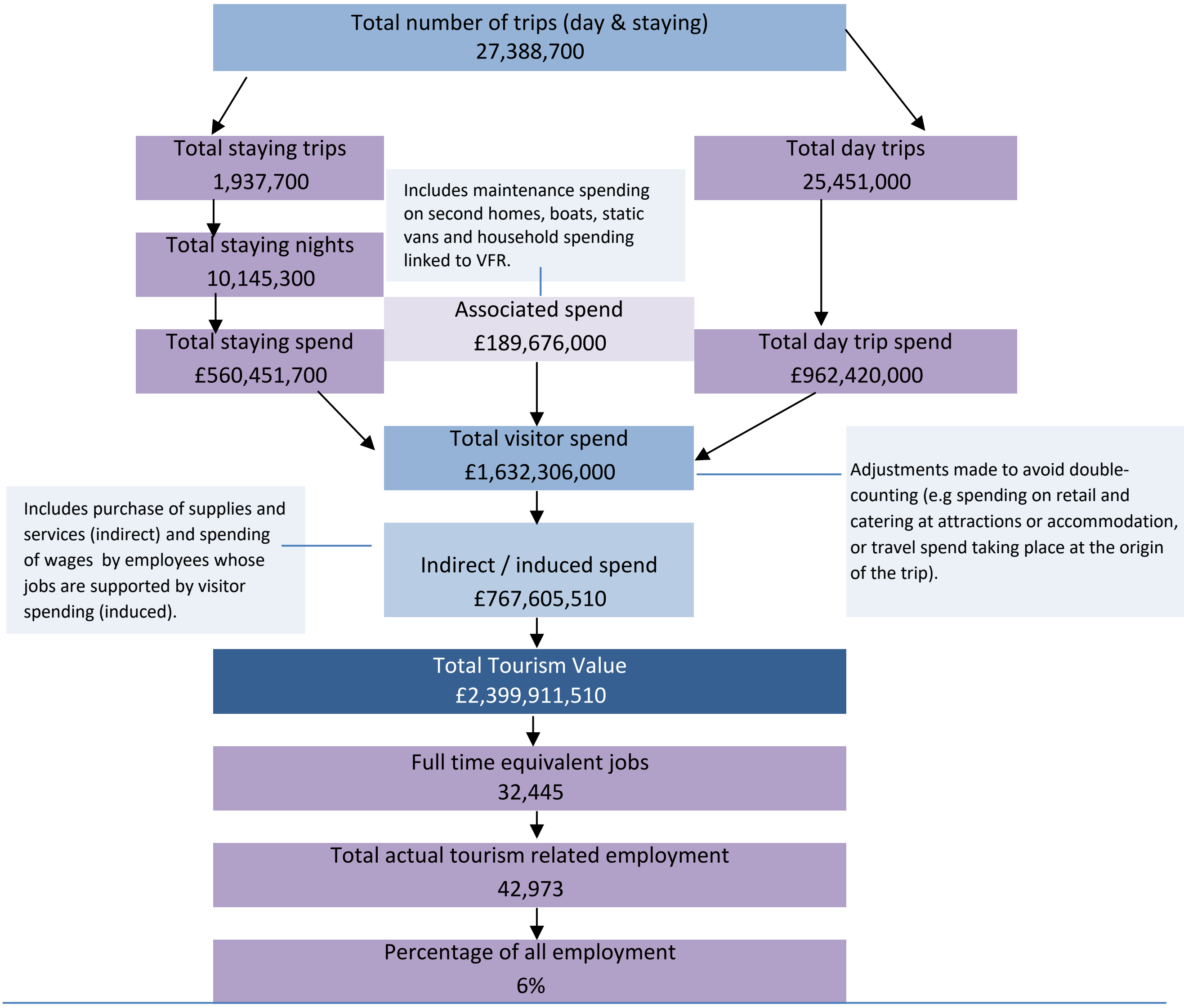
Overseas tourism

Visitor numbers: Official data from the Office for National Statistics (ONS) showed that there were 38.0 million overseas tourists visiting the UK last year (up 21% vs 2022). Overall, 292.9m nights were spent in the UK in 2023, up 1% vs 2019 and up 11% vs 2022.

Visitor spending: In nominal terms, spend has been setting records, although not in real terms i.e. adjusting for inflation. Spend per visit has been almost tracking inflation, therefore the total value of spend has been almost tracking the volume of visits in real terms i.e. adjusting for inflation. Inbound visitors spent a record £31.1 billion during 2023, up 17% vs 2022. Taking inflation into account, visitor spend was up 9% vs 2022.

The East of England registered 2.2 million inbound visits during 2023 (up 9% from 2.0 million trips in 2022). These trips contributed a total of £1.1 billion in spend (up 11% from £1.0 billion in 2022).

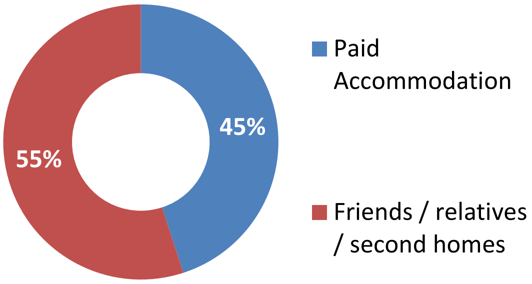
Economic Impact of Tourism – Headline Figures   Hertfordshire - 2023 Results



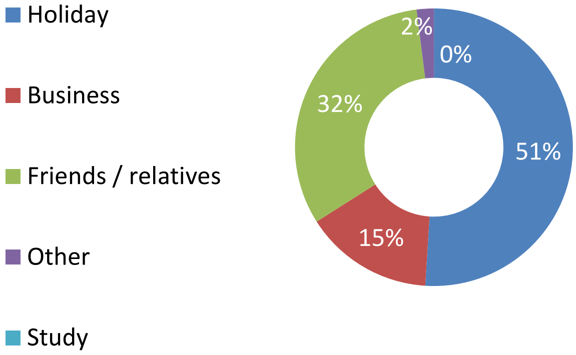
					Year-on-year comparison		
Day Trips	**2023**	**2022**	**2021**	**2019**	**23 v 22**	**23 v 21**	**23 v 19**
Day trips Volume	25,451,000	23,371,000	18,154,000	27,072,000	9%	40%	-6%
Day trips Value	£962,420,000	£927,774,000	£691,007,000	£1,049,479,000	4%	39%	-8%
Overnight trips							
Number of trips	1,937,700	1,633,300	1,405,200	1,923,000	19%	38%	1%
Number of nights	10,145,300	8,954,700	7,193,800	10,241,000	13%	41%	-1%
Trip value	£560,451,700	£482,355,000	£303,142,000	£499,203,000	16%	85%	12%
Total Value	**£2,399,911,510**	**£2,209,579,040**	**£1,581,076,000**	**£2,427,434,000**	9%	52%	-1%
Actual Jobs	**42,973**	**38,936**	**33,889**	**43,390**	10%	27%	-1%
	2023	**2022**	**2021**	**2019**	**23 v 22**	**23 v 21**	**23 v 19**
Number of nights	5.24	5.48	5.12	5.33	-4.5%	2.3%	-1.7%
Spend x staying trip	£289.24	£295.33	£215.73	£259.60	-2.1%	34.1%	11.4%
Spend x night	£55.24	£53.87	£42.14	£48.75	2.6%	31.1%	13.3%
Spend x day trip	£37.81	£39.70	£38.06	£38.77	-4.7%	-0.7%	-2.5%

Economic Impact of Tourism – Headline Figures   Hertfordshire - 2023 Results

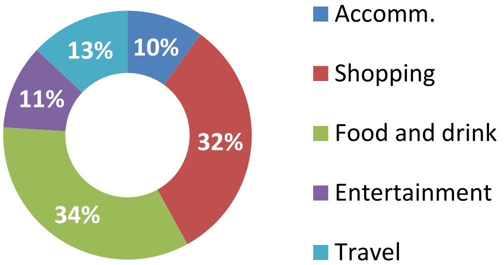
Trips by type of accommodation



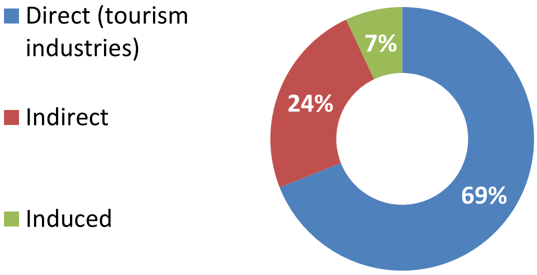
Trips by Purpose



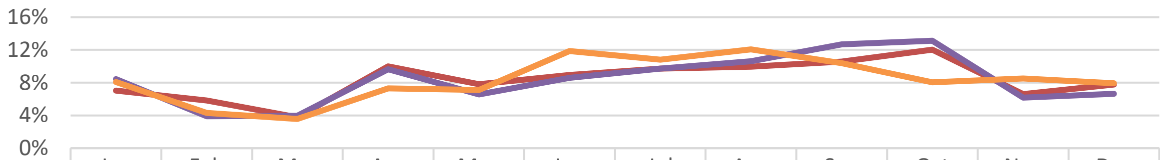
Breakdown of expenditure



Type of employment



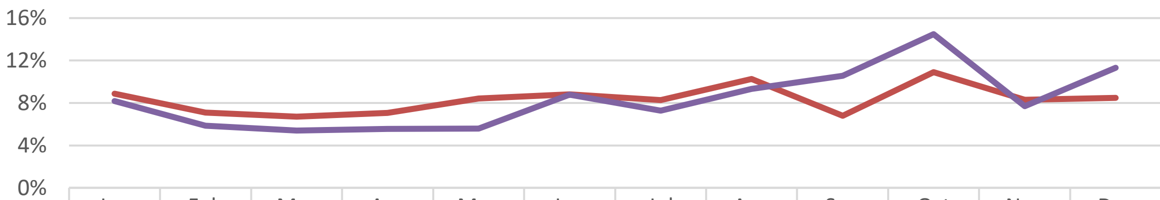
Domestic Overnight Trips - East of England - 2023



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trips	7%	6%	4%	10%	8%	9%	10%	10%	11%	12%	7%	8%
Nights	8%	4%	4%	10%	7%	9%	10%	11%	13%	13%	6%	7%
Spend	8%	4%	4%	7%	7%	12%	11%	12%	10%	8%	9%	8%

Trips Nights Spend

Tourism Day Trips - East of England - 2023



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trips	9%	7%	7%	7%	8%	9%	8%	10%	7%	11%	8%	8%
Spend	8%	6%	5%	6%	6%	9%	7%	9%	11%	14%	8%	11%

Trips Spend

Source: VisitBritain

Volume of Tourism

Staying visits in the county context

Staying trips in the county context

All figures have been rounded and some tables may show slight discrepancy between totals and sub totals.

District	Domestic trips ('000)	Overseas trips ('000)
North Herts	153	38
Stevenage	127	25
East Herts	209	49
Broxbourne	108	28
Welwyn Hatfield	154	41
St Albans	226	48
Dacorum	230	46
Three Rivers	71	28
Watford	169	30
Hertsmere	127	30
Hertfordshire	**1,574**	**364**

Staying nights in the county context

District	Domestic nights ('000)	Overseas nights ('000)
North Herts	709	290
Stevenage	521	160
East Herts	955	522
Broxbourne	528	218
Welwyn Hatfield	689	642
St Albans	945	382
Dacorum	973	378
Three Rivers	393	190
Watford	646	211
Hertsmere	562	232
Hertfordshire	**6,921**	**3,225**

Expenditure in the county context

District	Domestic spend (millions)	Overseas spend (millions)
North Herts	£35.5	£15.7
Stevenage	£30.9	£8.9
East Herts	£49.3	£30.6
Broxbourne	£23.2	£11.8
Welwyn Hatfield	£37.5	£38.3
St Albans	£54.9	£21.4
Dacorum	£59.5	£21.7
Three Rivers	£14.4	£10.0
Watford	£42.3	£12.1
Hertsmere	£29.8	£12.6
Hertfordshire	**£377.3**	**£183.1**

Staying Visitors - Accommodation Type

Hertfordshire - 2023 Results

Trips by Accommodation

		UK		Overseas		Total	
Serviced		661,000	42%	19,600	6%	680,600	35%
Self-catering		16,000	1%	6,400	2%	22,400	1%
Camping		16,000	1%	3,900	1%	19,900	1%
Static caravans		0	0%	0	0%	0	0%
Group/campus		16,000	1%	4,100	1%	20,100	1%
Paying guest		0	0%	8,300	2%	8,300	1%
Second homes		16,000	1%	7,500	2%	23,500	1%
Boat moorings		16,000	1%	0	0%	16,000	1%
Other		63,000	4%	39,700	11%	102,700	5%
Friends & relatives		770,100	49%	274,100	75%	1,044,200	54%
Total	**2023**	**1,574,100**		**363,600**		**1,937,700**	
Comparison	**2021**	**1,277,000**		**128,200**		**1,405,200**	
Difference		**23%**		**184%**		**38%**	

Nights by Accommodation

		UK		Overseas		Total	
Serviced		1,610,700	23%	43,200	1%	1,653,900	16%
Self-catering		48,000	1%	526,300	16%	574,300	6%
Camping		129,000	2%	23,500	1%	152,500	1%
Static caravans		0	0%	0	0%	0	0%
Group/campus		53,000	1%	167,900	5%	220,900	2%
Paying guest		0	0%	84,300	3%	84,300	1%
Second homes		19,000	0%	162,900	5%	181,900	2%
Boat moorings		85,000	1%	0	0%	85,000	1%
Other		370,000	5%	48,300	2%	418,300	4%
Friends & relatives		4,606,000	67%	2,168,200	67%	6,774,200	67%
Total	**2023**	**6,920,700**		**3,224,600**		**10,145,300**	
Comparison	**2021**	**6,168,000**		**1,025,800**		**7,193,800**	
Difference		**12%**		**214%**		**41%**	

Spend by Accommodation

		UK		Overseas		Total	
Serviced		£185,662,000	49%	£9,173,000	5%	£194,835,000	35%
Self-catering		£4,746,000	1%	£21,060,000	12%	£25,806,000	4%
Camping		£2,601,000	1%	£875,000	1%	£3,476,000	1%
Static caravans		£0	0%	£0	0%	£0	0%
Group/campus		£5,364,000	1%	£9,287,000	5%	£14,651,000	3%
Paying guest		£0	0%	£4,474,000	2%	£4,474,000	1%
Second homes		£1,190,000	1%	£5,397,000	3%	£6,587,000	1%
Boat moorings		£4,762,000	1%	£0	0%	£4,762,000	1%
Other		£18,830,000	5%	£6,232,000	3%	£25,062,000	4%
Friends & relatives		£154,175,000	41%	£126,623,700	69%	£280,798,700	50%
Total	**2023**	**£377,330,000**		**£183,121,700**		**£560,451,700**	
Comparison	**2021**	**£260,344,000**		**£42,798,000**		**£303,142,000**	
Difference		**45%**		**328%**		**85%**	

Serviced accommodation includes hotels, guesthouses, inns, B&Bs 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

Hertfordshire - 2023 Results

Trips by Purpose

		UK		Overseas		Total	
Holiday		913,000	58%	72,800	20%	985,800	51%
Business		283,300	18%	10,900	3%	294,200	15%
Friends & relatives		346,300	22%	261,800	72%	608,100	32%
Other		31,500	2%	14,500	4%	46,000	2%
Study		0	0%	3,600	1%	3,600	0%
Total	**2023**	**1,574,100**		**363,600**		**1,937,700**	
Comparison	**2021**	**1,277,000**		**128,200**		**1,405,200**	
Difference		**23%**		**184%**		**38%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		4,221,600	61%	451,400	14%	4,673,000	46%
Business		968,900	14%	96,700	3%	1,065,600	10%
Friends & relatives		1,591,800	23%	2,386,300	74%	3,978,100	39%
Other		138,400	2%	225,700	7%	364,100	4%
Study		0	0%	64,500	2%	64,500	1%
Total	**2023**	**6,920,700**		**3,224,600**		**10,145,300**	
Comparison	**2021**	**6,168,000**		**1,025,800**		**7,193,800**	
Difference		**12%**		**214%**		**41%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£150,932,000	40%	£42,118,000	23%	£193,050,000	34%
Business		£124,518,900	33%	£9,156,100	5%	£133,675,000	24%
Friends & relatives		£94,332,500	25%	£113,535,500	62%	£207,868,000	37%
Other		£7,546,600	2%	£14,649,700	8%	£22,196,300	4%
Study		£0	0%	£3,662,400	2%	£3,662,400	1%
Total	**2023**	**£377,330,000**		**£183,121,700**		**£560,451,700**	
Comparison	**2021**	**£260,344,000**		**£42,798,000**		**£303,142,000**	
Difference		**45%**		**328%**		**85%**	

Overseas Overnight Visitors to the East of England - Regional ranking by volume and value of visits

Top 10 nations by volume of visits (000s)		Top 10 nations by volume of spend (£m)	
Irish Republic	217.7	USA	£197.6
USA	194.8	France	£56.4
Germany	176.4	Germany	£56.4
France	160.5	Australia	£53.2
Spain	152.3	Irish Republic	£52.2
Netherlands	136.3	Netherlands	£44.2
Poland	134.7	Spain	£39.5
Romania	89.5	Poland	£39.2
Italy	89.1	Romania	£30.4
Australia	79.3	Italy	£29.1

Source: International Passenger Survey - East of England, 2023

Domestic Overnight Visitors - Purpose of Trip

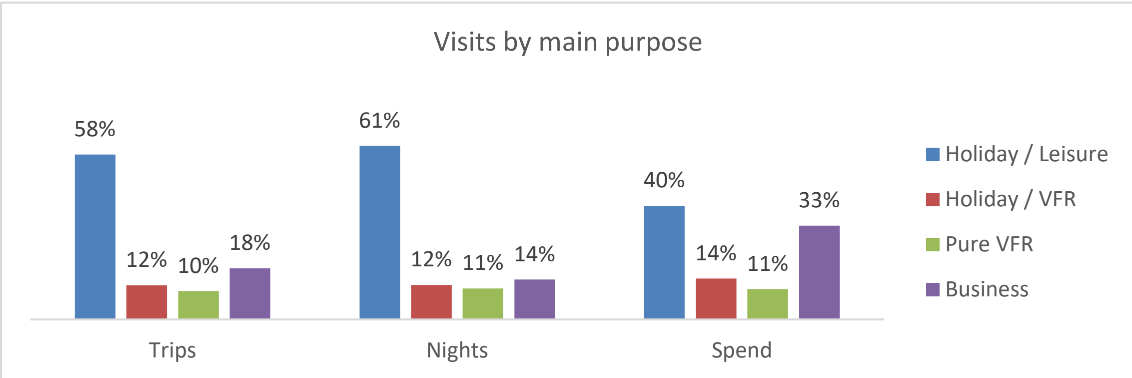
Hertfordshire - 2023 Results

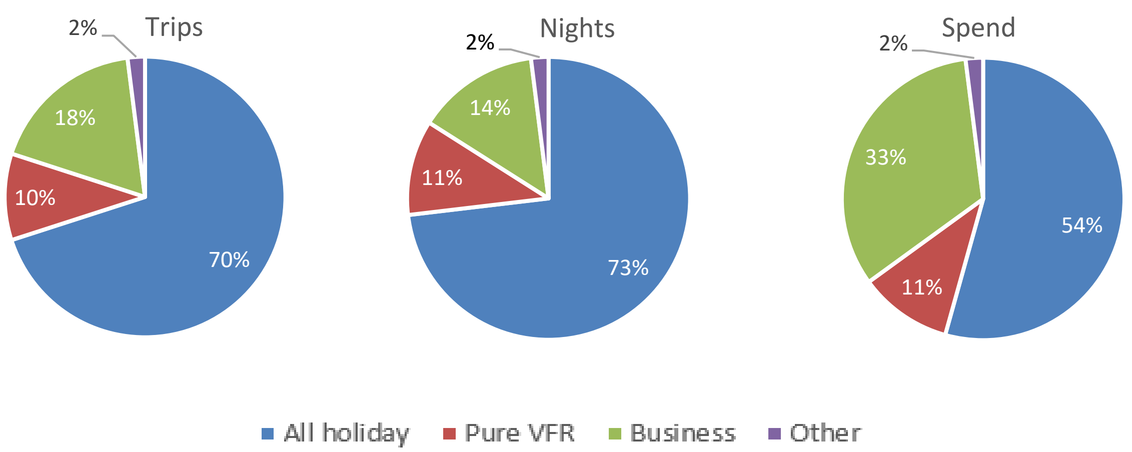
Total holiday trips include visits to destinations in Hertfordshire for pleasure / leisure purposes staying with friends and relatives. Pure VFR are visits to friends and relatives for social and personal reasons, and do not include holiday trips staying with friends and relatives.

	Trips		Nights		Expenditure	
Holiday / Leisure	912,300	58%	4,221,400	61%	£150,931,500	40%
Holiday / VFR	190,000	12%	839,000	12%	£54,084,000	14%
Pure VFR	157,000	10%	753,000	11%	£40,249,000	11%
Business	283,300	18%	968,900	14%	£124,518,900	33%
Other	31,500	2%	138,400	2%	£7,546,600	2%
Total	**1,574,100**		**6,920,700**		**£377,330,000**	

Holiday trips involving paid accommodation make up the largest proportion of domestic trips and incur the highest average spend per trip and night. Pure VFR trips (i.e. for social and personal reasons excluding holiday) are the shortest in length and are subject to the lowest levels of expenditure.

	Holiday / Leisure	Holiday / VFR	Pure VFR	Business
Average length stay (nights x trip)	4.6	4.4	4.8	3.4
Spend x overnight trip	£165.44	£284.65	£256.36	£439.53
Spend x night	£35.75	£64.46	£53.45	£128.52





Total Volume and Value of Day Trips

		Trips		Spend	
Urban visits		**18,097,000**	71%	**£809,136,000**	84%
Countryside visits		**7,354,000**	29%	**£153,284,000**	16%
Total	**2023**	**25,451,000**	**100%**	**£962,420,000**	**100%**
Comparison	**2021**	18,154,000		£691,007,000	
Difference		**40%**		**39%**	

Day Visitors in the County Context

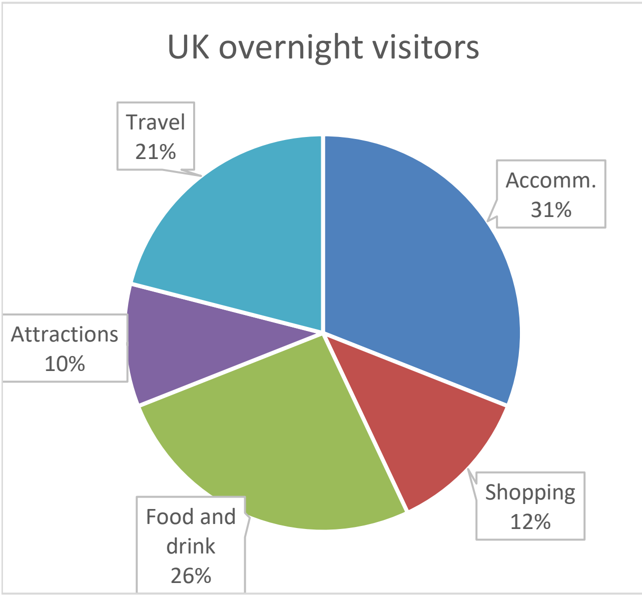
All figures have been rounded and some tables may show slight discrepancy between totals and sub totals.

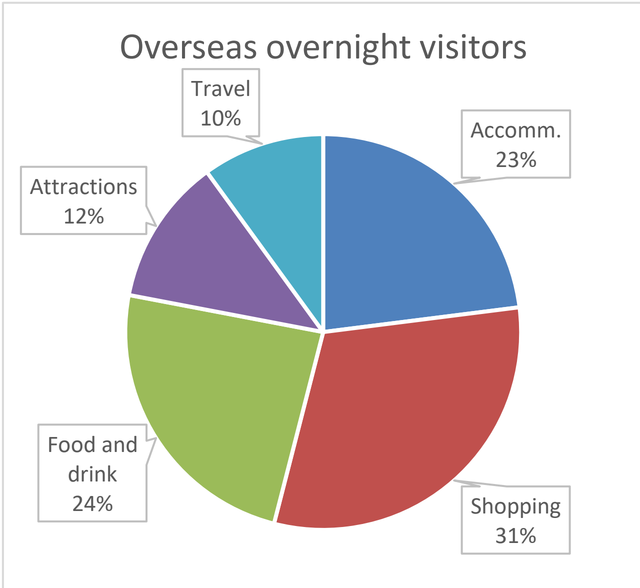
District	Day Visits (millions)	Day visit Spend (millions)
North Herts	2.8	£99.7
Stevenage	2.2	£79.5
East Herts	4.0	£149.1
Broxbourne	1.7	£65.7
Welwyn Hatfield	1.7	£66.3
St Albans	1.8	£68.4
Dacorum	3.2	£118.6
Three Rivers	4.1	£167.3
Watford	2.2	£84.6
Hertsmere	1.8	£63.2
Hertfordshire	**25.5**	**£962.4**

Value of Tourism

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£116,972,300	£45,279,600	£98,105,800	£37,733,000	£79,239,300	£377,330,000
Overseas tourists	£42,118,000	£56,767,700	£43,949,200	£21,974,600	£18,312,200	£183,121,700
Total Staying	£159,090,300	£102,047,300	£142,055,000	£59,707,600	£97,551,500	£560,451,700
Total Staying (%)	28%	18%	25%	11%	18%	100%
Total Day Visitors	£0	£384,968,000	£375,343,800	£105,866,200	£96,242,000	£962,420,000
Total Day Visitors (%)	0%	40%	39%	11%	10%	100%
Total 2023	**£159,090,300**	**£487,015,300**	**£517,398,800**	**£165,573,800**	**£193,793,500**	**£1,522,871,700**
%	**10%**	**32%**	**34%**	**11%**	**13%**	**100%**
Comparison 2021	**£76,249,000**	**£252,711,000**	**£357,823,200**	**£116,694,400**	**£190,671,400**	**£994,149,000**
Difference	**109%**	**93%**	**45%**	**42%**	**2%**	**53%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£1,821,000	£778,000	£0	£187,077,000	£189,676,000

Spend on second homes is assumed to be an average of £2,150 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,150 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 £2,150. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £195 per visit has been assumed based on national research for social and personal visits.

Direct Turnover Derived From Trip

Hertfordshire - 2023 Results

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 Visitors	Day Visitors	Total
Accommodation		£160,070,000	£7,430,000	£167,500,000
Retail		£101,365,000	£381,183,000	£482,548,000
Catering		£136,655,000	£360,427,000	£497,082,000
Attractions		£62,130,000	£113,012,000	£175,142,000
Transport		£60,139,000	£60,219,000	£120,358,000
Non-trip spend		£189,676,000	£0	£189,676,000
Total Direct	**2023**	**£710,035,000**	**£922,271,000**	**£1,632,306,000**
Comparison	**2021**	**£456,747,000**	**£638,239,000**	**£1,094,986,000**
Difference		**55%**	**45%**	**49%**

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 Visitors	Day Visitors	Total
Indirect spend		£226,230,340	£329,947,730	£556,178,070
Non-trip spending		£48,699,280	£0	£48,699,280
Income induced		£116,396,280	£46,331,880	£162,728,160
Total	**2023**	**£391,325,900**	**£376,279,610**	**£767,605,510**
Comparison	**2021**	**£253,069,000**	**£233,021,000**	**£486,090,000**
Difference		**55%**	**61%**	**58%**

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 Visitors	Day Visitors	Total
Direct		£710,035,000	£922,271,000	£1,632,306,000
Indirect		£391,325,900	£376,279,610	£767,605,510
Total Value	**2023**	**£1,101,360,900**	**£1,298,550,610**	**£2,399,911,510**
Comparison	**2021**	**£709,816,000**	**£871,260,000**	**£1,581,076,000**
Difference		**55%**	**49%**	**52%**

Employment

Employment

Hertfordshire - 2023 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 Visitors		Day Visitors		Total	
Accommodation		2,541	26%	120	1%	2,661	13%
Retail		810	8%	3,017	28%	3,827	18%
Catering		2,034	21%	5,435	50%	7,469	36%
Entertainment		1,060	11%	1,975	18%	3,035	15%
Transport		362	4%	362	3%	724	4%
Non-trip spend		2,972	30%	0	0%	2,972	14%
Total FTE	**2023**	**9,779**		**10,909**		**20,688**	
Comparison	**2021**	**7,461**		**8,616**		**16,077**	
Difference		**31%**		**27%**		**29%**	

Estimated actual jobs							
		Staying Visitors		Day Visitors		Total	
Accommodation		3,762	28%	177	1%	3,939	13%
Retail		1,214	9%	4,526	28%	5,740	19%
Catering		3,050	23%	8,153	51%	11,203	38%
Entertainment		1,495	11%	2,784	17%	4,279	15%
Transport		511	4%	511	3%	1,022	4%
Non-trip spend		3,388	25%	0	0%	3,388	11%
Total Actual	**2023**	**13,420**		**16,151**		**29,571**	
Comparison	**2021**	**9,770**		**12,717**		**22,487**	
Difference		**37%**		**27%**		**32%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitors	Day Visitors	Total
Indirect jobs		4,211	5,053	9,264
Induced jobs		1,783	710	2,493
Total FTE	**2023**	**5,994**	**5,763**	**11,757**
Comparison	**2021**	**5,208**	**4,795**	**10,003**
Difference		**15%**	**20%**	**18%**

Estimated actual jobs				
		Staying Visitors	Day Visitors	Total
Indirect jobs		4,800	5,761	10,561
Induced jobs		2,032	809	2,841
Total Actual	**2023**	**6,832**	**6,570**	**13,402**
Comparison	**2021**	**5,936**	**5,466**	**11,402**
Difference		**15%**	**20%**	**18%**

Total Tourism Jobs

Hertfordshire - 2023 Results

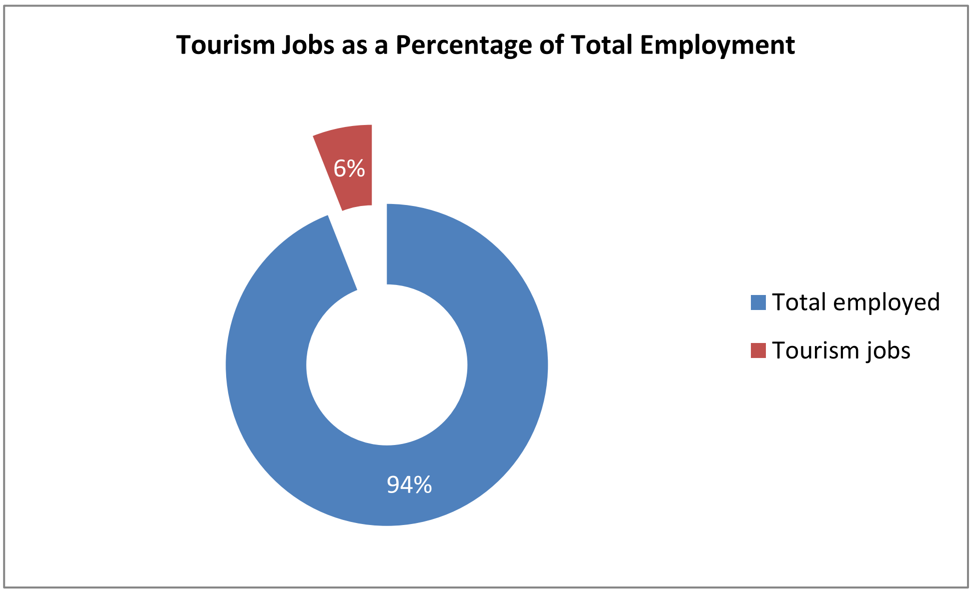
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitors		Day Visitors		Total	
Direct		9,779	62%	10,909	66%	20,688	64%
Indirect		4,211	27%	5,053	30%	9,264	28%
Induced		1,783	11%	710	4%	2,493	8%
Total FTE	**2023**	**15,773**		**16,672**		**32,445**	
Comparison	**2021**	**12,669**		**13,411**		**26,080**	
Difference		**25%**		**24%**		**24%**	

Estimated actual jobs							
		Staying Visitors		Day Visitors		Total	
Direct		13,420	66%	16,151	71%	29,571	69%
Indirect		4,800	24%	5,761	25%	10,561	24%
Induced		2,032	10%	809	4%	2,841	7%
Total Actual	**2023**	**20,252**		**22,721**		**42,973**	
Comparison	**2021**	**15,706**		**18,183**		**33,889**	
Difference		**29%**		**25%**		**27%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitors	Day Visitors	Total
Total employed		719,000	719,000	719,000
Tourism jobs		20,252	22,721	42,973
Proportion all jobs		**3%**	**3%**	**6%**
Comparison	**2021**	**15,706**	**18,183**	**33,889**
Difference		**29%**	**25%**	**27%**



Economic Impact of Tourism – Headline Figures   Hertfordshire - 2023 Results

The key 2023 results of the Economic Impact Assessment are:

27.4 million trips were undertaken in the area.
25.5 million day trips.
1.9 million overnight visits**.**

10.1 million nights in the area as a result of overnight trips**.**

£1,632 million spent by tourists during their visit to the area.
£136 million spent on average in the local economy each month.

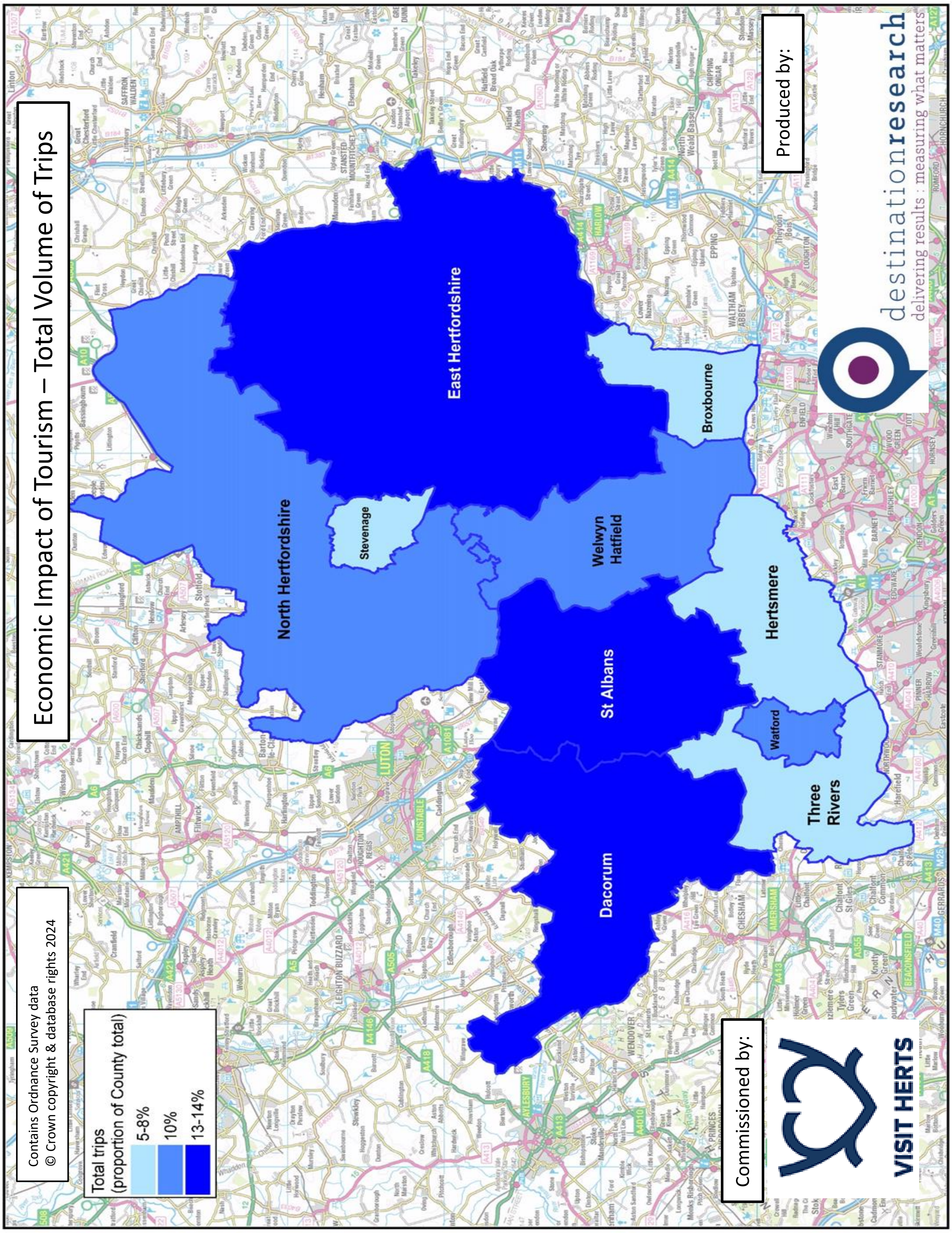
£560 million generated by overnight visits.
£962 million generated from day trips.

£2,400 million spent in the local area as result of tourism, taking into account multiplier effects.

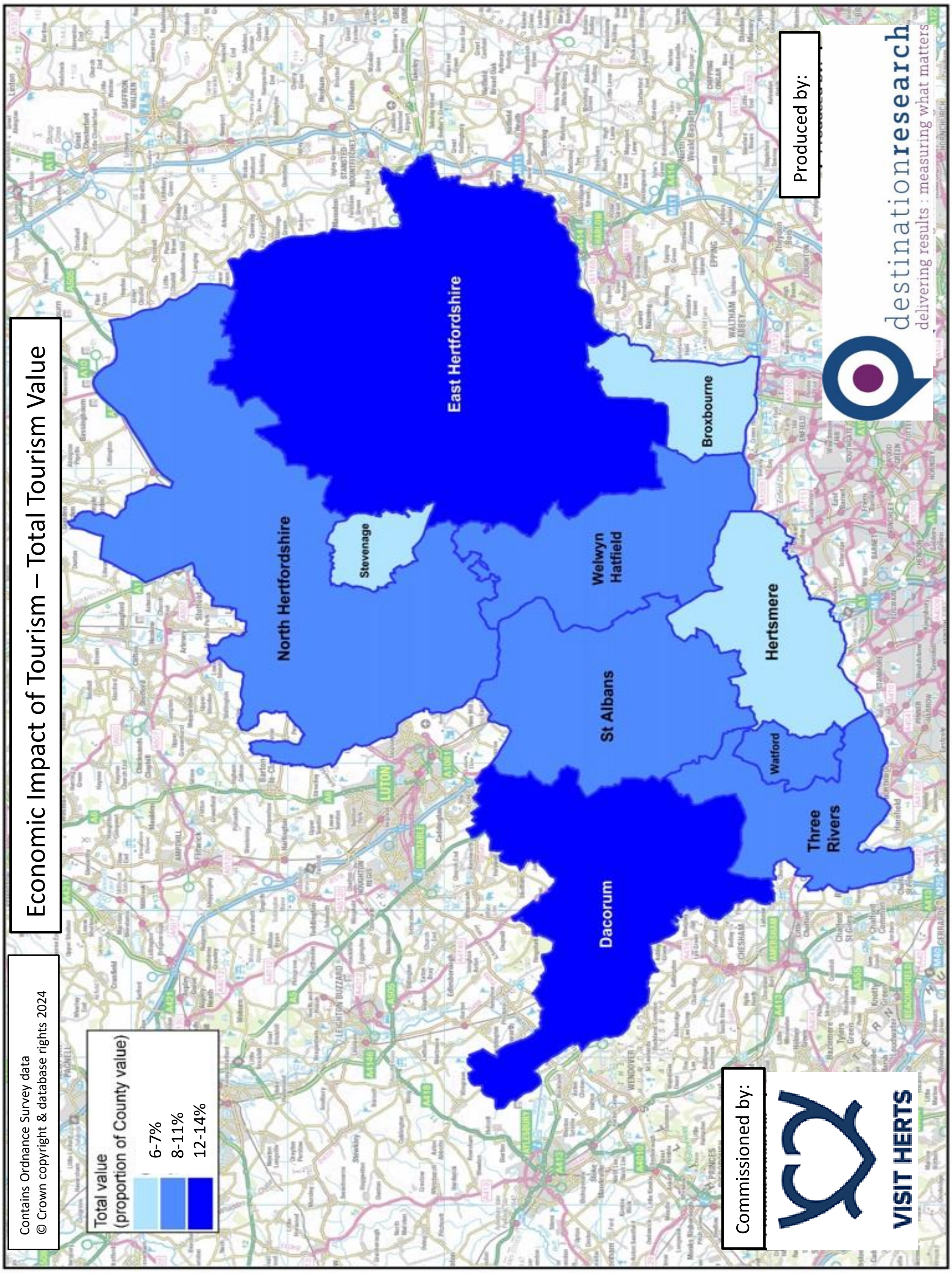
42,973 jobs supported, both for local residents and from those living nearby.
29,571 tourism jobs directly supported.
13,402 non-tourism related jobs supported linked to multiplier spend from tourism.

Note: The figures have been rounded. For a full set of results, please refer to the main report.

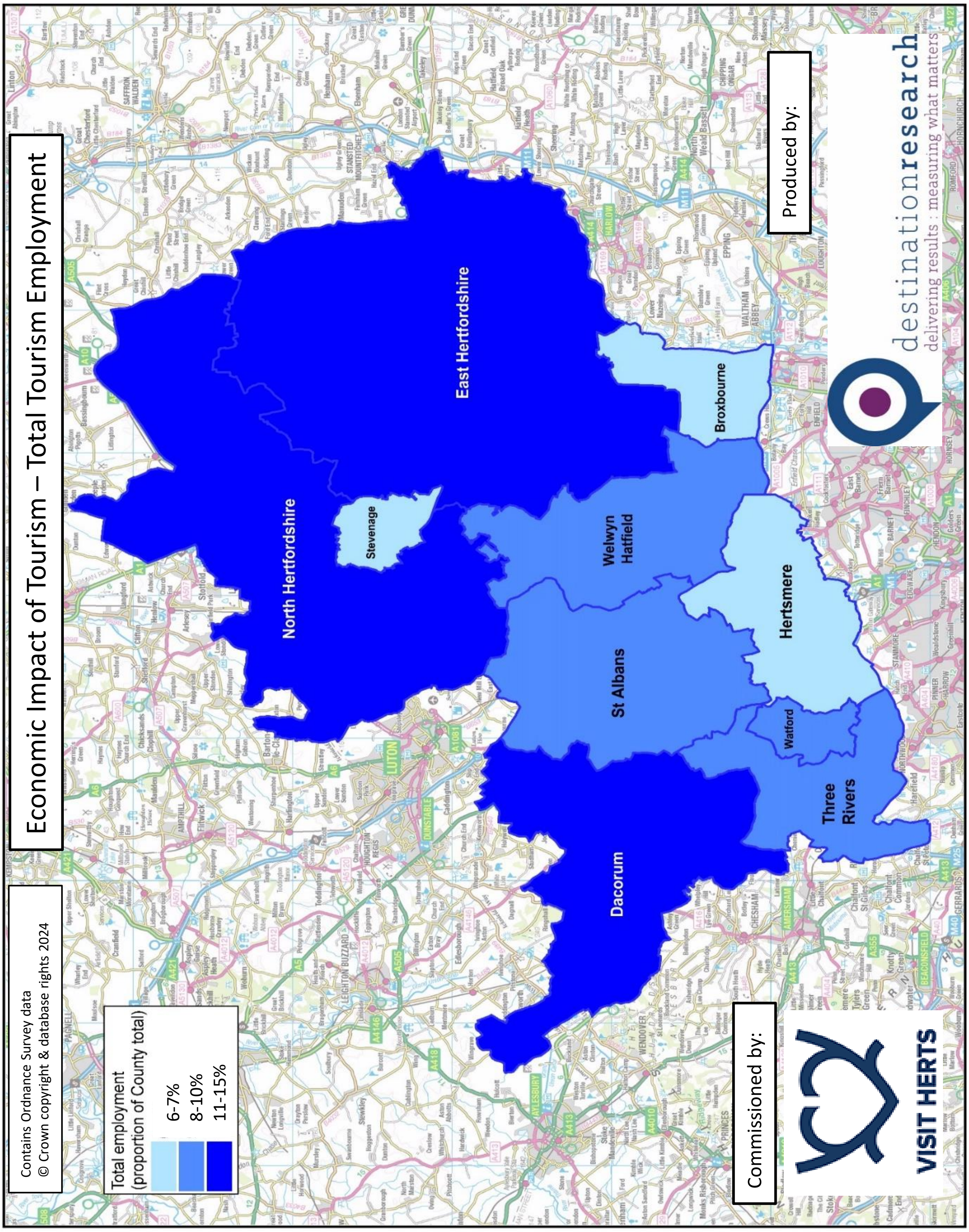
Thematic maps - Total Volume of Trips



Thematic maps - Total Tourism Value



Thematic maps - Total Tourism Employment



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.

Data sources

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

- Domestic tourism statistics: An online survey collecting data on both domestic overnight trips as well as domestic day trips.
- International Passenger Survey (IPS) information on overseas visitors to the UK.

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
- VisitEngland's surveys of Visits to Attractions, which provides data on the number of visitors to individual tourist attractions
- Attractions data supplied by ALVA (Association of Leading Visitor Attractions)
- Short-term rental stock and occupancy - Lighthouse / AirDNA
- Hotel market data and benchmarking – STR
- Latest estimates of resident population as based on the Census of Population
- Selected data from ONS employment-related surveys
- Selected data on the countryside and coast including national designations and length of the coastline (where relevant).

The model also includes contextual and sector-specific data from third-party sources and destination-level business performance data captured by or on behalf of our destination partners. Data sources include:

- Tourism business counts - Inter Departmental Business Register (IDBR)
- UK inflation data - Consumer Prices Index (CPI, CPIH), Retail Prices Index (RPI)
- UK economy forecasts - Office for Budget Responsibility: Economic and fiscal outlook
- Footfall data (town centres, large retail outlets and car parks).

Limitations of the Model

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.

Staying Visitors
Data on domestic overnight visits is based on a new combined online survey that replaced the separate Great Britain Tourism Survey and Great Britain Day Visits Survey. It 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 International Passenger Survey (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 a regional level is available from a new combined online survey that replaced the separate Great Britain Tourism Survey and Great Britain Day Visits Survey. The new 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 tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of actual jobs (both direct and indirect) supported by tourism expenditure in the county.

The above-mentioned surveys offer a 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 is 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 income-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.

<u>Local level data for Hertfordshire EIA Reports 2023</u>

The Cambridge Model allows for the use of local visitor related data. Local data from visitor surveys 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 sourced data to feed into the model. Datasets used to produce the 2023 results include:

Hertfordshire
- Headline STR data including occupancy, ADR and RevPAR for 2023, 2022 and 2021.
- Any information on major openings or closures in 2023.
- Short-term rental accommodation data.

Dacorum
- Any information on major openings or closures in 2023.
- Annual Events (Armed Forces Day, Summer Carnivals in Kings Langley & Tring, Lark in the Park event in Gadebridge Park, Ashridge House outdoor cinema, Sausage & Cider festival Hemel Gadebridge Park, Tringe Comedy Festival, Steam Fayre).
- Footfall data for 2021 and 2023 across the high street/town centre areas for Hemel Hempstead (Marlowes), Hemel Old Town, Berkhamsted and Tring.

East Herts
- Footfall data for 2021 and 2023 for all 5 towns

North Herts
- Footfall data for each of the North Herts towns

St Albans
- Monthly footfall data reports from St Albans BID.
- Events in 2023 (St Albans Festival 2023, St Albans Food & Drink Festival 2023, Christmas Cracker 2023, Harpenden Christmas light switch on 2023, Pub in the Park 2023, Comedy Garden, Fireworks event and various events at the Cathedral).
- St Albans Cathedral figures and events.

Welwyn Hatfield
- Events (Lemsford Village Fete, Living Crafts, World Food Festival, Slam Dunk, Race for Life, Vintage Festival, Battle Proms, Folk by the Oak, Hatfield Community Fair, UK's Strongest Man, Screen on the Green, Classic Ibiza, Corona Festival, Fantastic Fireworks, Diwali Celebration).

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