The Broads

STEAM Tourism Economic Impacts
2014-15 Review
Summary

Broads Authority
The Broads - a member of the National Park family

The Value of Broads Tourism 2015

This is a summary of the STEAM tourism economic impact research undertaken for The Broads Authority by Global Tourism Solutions (UK) Ltd. The research covers the economic effects associated with land and water-based tourism within the Broads National Park as well as the area immediately surrounding the Broads National Park, used by staying visitors as a base for visits into the National Park: this is identified as the Broads *Influence Area*.

The Broads received
7.44 million
Tourism Visits

Visitors **staying** as part of a holiday or short break, accounted for **1.19 million visits** and **6.37 million nights** in local accommodation

12.62 million Visitor Days and Nights generated by visitors

A total of **£584 million** was generated within the local economy through visitor and tourism business expenditure

6.25 million tourism visits made by **Day Visitors**

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Day Visits generated **£219 million** for the local economy

On average, visitors **staying in the Broads area** spend 5.3 nights and spend **£92 million** on local accommodation

Visitors to the Broads help support over
7 thousand
full time equivalent jobs

In total, **staying visitors** generate a **total economic impact** of **£365 million** for the businesses and communities in the Broads area

The **Broads National Park** welcomed **6.85 million visitors**, generating an economic impact of **£388 million**

An economic impact of **£196 million** was due to the **0.59 million visitors** to the **Broads Influence Area**

2015

Visitor Types

Staying Visitors encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation. Boats are also included in this category.
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

Day Visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

Total Visitor Numbers

7.44m

% Change 2014>2015

-4.3%

Net Change 2014>2015

-0.34m Visits

Visitor Numbers

The Broads received 7.44 million tourism visits during 2015. There has been a fall of 4.3% in visitor numbers since 2014, although growth has been seen in 3 out of the last 5 years and 2015 still showed a net increase of over 100,000 visitors compared with 2010.

Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015 (Millions)	**M**	**0.148**	**0.869**	**0.176**	**1.193**	**6.248**	**7.441**
2014 (Millions)	M	0.160	0.898	0.174	1.232	6.545	7.777
Change 14/15 (%)	**%**	**-7.5**	**-3.2**	**+1.1**	**-3.2**	**-4.5**	**-4.3**
Share of Total (%)	%	2.0	11.7	2.4	16.0	84.0	100.0

Day visitors are crucially important to the Broads, making up 84% of total tourism trips in 2015. The area welcomed 6.25 million tourism day visitors in 2015. This was a fall of 4.5% compared with 2014. Performance in this sector has been mixed over the last 6 years but has shown a generally upward trend, with an increase of 3.0% in day visitors since 2010.

The staying visitor sector is dominated by visitors using non-serviced accommodation, with these making up 73% of staying visitor numbers in 2015. 56% of the non-serviced bed stock is in privately owned or for-hire boats, and these showed a sharper than average fall in visitor numbers of -7.1%, compared with -3.2% for the whole sector.

92% of visitor trips are to the Broads National Park, both water- and land-based, with the remaining 8% attributed to the Broads Influence Area.

Total Visitor Days

12.62m

% Change 2014>2015

-2.7%

Net Change 2014>2015

-0.35m Visitor Days

Visitor Days

The 7.44m visits to the Broads during 2015 generated a total of 12.62 million days spent in the area by staying visitors and day visitors.

Key Figures: Visitor Days

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015 (Millions)	**M**	**0.270**	**5.682**	**0.419**	**6.371**	**6.248**	**12.620**
2014 (Millions)	M	0.288	5.718	0.414	6.420	6.545	12.966
Change 14/15 (%)	**%**	**-6.2**	**-0.6**	**+1.2**	**-0.8**	**-4.5**	**-2.7**
Share of Total (%)	%	2.1	45.0	3.3	50.5	49.5	100.0

In 2015, there was an almost equal split in terms of visitor days between staying visitors (50.5%) and day visitors (49.5%). The staying visitor sector is dominated by non-serviced accommodation, which is responsible for 89.2% of staying visitor days. The slight fall of -0.8% in staying visitor days from 2014-15 was partly driven by a reduction of commercial bed stock (-7.5% for serviced accommodation and -1.6% for non-serviced) though this was mitigated by a small increase in occupancy.

A total of 9.28 million visitor days were spent within the Broads National Park itself, representing 74% of the total. The remaining 26% - 3.34 million days - were spent within the Broads Influence Area.

Average Length of Stay in Days for Different Visitor Types – 2015

Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	Staying Visitors	Non-Serviced Accommodation
1	1.7	1.8	2.4	5.3	6.5

Total Economic Impact

£584.2m

% Change 2014>2015

-1.6%

Net Change 2014>2015

-£9.4m

Visitor Expenditure and Total Economic Impact

Tourism visits were estimated to have generated £584 million for the local economy in 2015, a change of -1.6% compared to 2014. This figure comprises *direct expenditure* of visitors on goods and services (£430.69 million) and the subsequent indirect / induced economic effects arising within the local economy (£153.55 million).

Distribution of Economic Effects

2015	Direct Visitor Expenditure						Indirect and Induced	Total Economic Impact
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	92.72	109.61	40.22	132.83	55.30	**430.69**	153.55	**584.24**

Note: m = million

Key Figures: Economic Impact

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015 (£ Millions)	**£M**	**32.175**	**313.243**	**19.429**	**364.848**	**219.390**	**584.241**
2014 (£ Millions)	£M	34.705	312.661	18.995	366.361	227.309	593.671
Change 14/15 (%)	**%**	**-7.3**	**+0.2**	**+2.3**	**-0.4**	**-3.5**	**-1.6**
Share of Total (%)	%	5.5	53.6	3.3	62.4	37.6	100.0

The two most important categories of spend are Shopping (£132.83m) and Food and Drink (£109.61m), between them making up 56% of direct expenditure.

Visitors to non-serviced accommodation contribute 53.6% of the economic impact, with day visitors the next most valuable group at 37.6%.

Average Economic Impact Generated by Each Type of Visitor – 2015

Economic Impact	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£ 119.19**	**£ 53.13**	**£ 46.36**	**£ 57.26**	**£ 35.11**	**£ 46.30**
Economic Impact per Visit	£ 217.52	£ 360.56	£ 110.18	£ 305.82	£ 35.11	£ 78.51

Total Employment Supported

7,245 FTEs

% Change 2014>2015

-5.4%

Net Change 2014>2015

-415 FTEs

Employment Supported by Tourism

Tourism visits to the Broads were estimated to have supported 7,245 Full-Time Equivalent jobs (FTEs) in 2015. 76.4% of these FTEs (5,537) are assumed to have been generated directly, through the expenditure of visitors (Direct Employment), with the remaining 23.6% (1,707) being indirect and induced, that is supported through the supply chain and further rounds of expenditure within the economy including employee spend.

Distribution of Employment

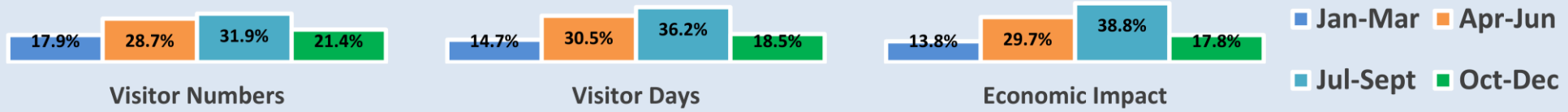
2015	Direct Employment						Indirect and Induced	Total Employment
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	1,175	1,572	700	1,737	354	**5,537**	1,707	**7,245**

Key Figures: Employment Supported

Employment Supported		Direct Employment						Indirect and Induced	Total
		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	Total Direct		
2015 (FTEs)	**FTE**	**550**	**2,701**	**188**	**3,439**	**2,098**	**5,537**	**1,707**	**7,245**
2014 (FTEs)	FTE	600	2,869	189	3,658	2,226	5,884	1,776	7,660
Change 14/15 (%)	**%**	**-8.4**	**-5.8**	**-0.1**	**-6.0**	**-5.8**	**-5.9**	**-3.9**	**-5.4**
Share of Total (%)	%	7.6	37.3	2.6	47.5	29.0	76.4	23.6	100.0

63% of direct employment is supported by the staying visitor market, accounting for 3,489 FTEs. Of these the vast majority (2,701 FTEs) are generated by visitors staying in non-serviced accommodation. Day visitors support a further 2,098 FTEs.

Distribution of Key Impacts by Quarter – 2015



STEAM FINAL TREND REPORT FOR 2009-2015
THE BROADS AUTHORITY + INFLUENCE AREA + BOATS

Comparing 2015 and 2014
All £'s Historic Prices

COMPARATIVE HEADLINES

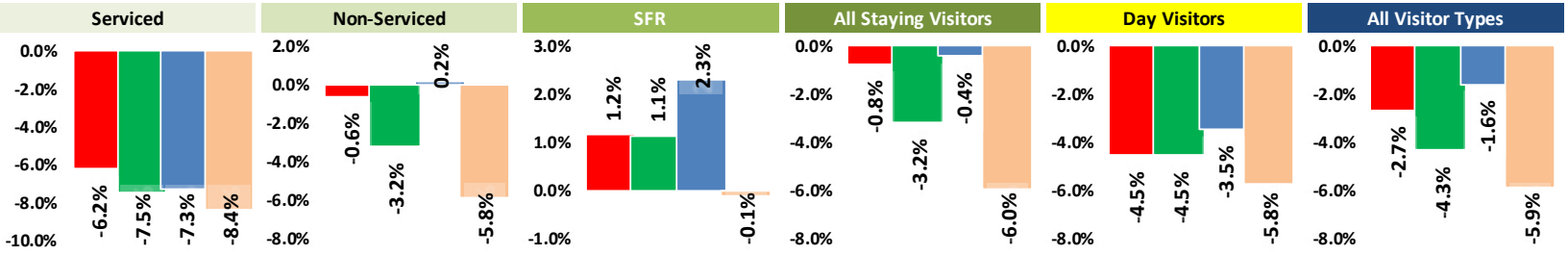
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2015 & 2014 - IN HISTORIC PRICES

KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

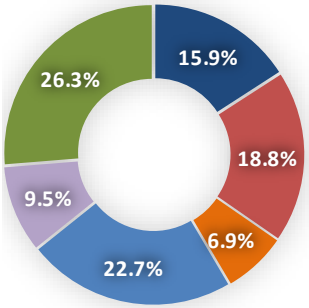
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %
Visitor Days	M	0.270	0.288	-6.2%	5.682	5.718	-0.6%	0.419	0.414	1.2%	6.371	6.420	-0.8%	6.248	6.545	-4.5%	12.62	12.97	-2.7%
Visitor Numbers	M	0.148	0.160	-7.5%	0.869	0.898	-3.2%	0.176	0.174	1.1%	1.193	1.232	-3.2%	6.248	6.545	-4.5%	7.441	7.777	-4.3%
Direct Expenditure	£M																430.69	437.70	-1.6%
Economic Impact	£M	32.18	34.70	-7.3%	313.24	312.66	0.2%	19.43	19.00	2.3%	364.85	366.36	-0.4%	219.39	227.31	-3.5%	584.24	593.67	-1.6%
Direct Employment	FTEs	550	600	-8.4%	2,701	2,869	-5.8%	188	189	-0.1%	3,439	3,658	-6.0%	2,098	2,226	-5.8%	5,537	5,884	-5.9%
Total Employment	FTEs																7,245	7,660	-5.4%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2015 & 2014 - IN HISTORIC PRICES

KEY
- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment



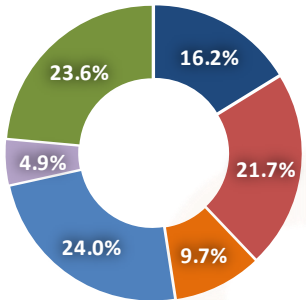
Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Sectors	2015	2014	+/- %
Accommodation	92.72	94.45	-1.8%
Food & Drink	109.61	111.16	-1.4%
Recreation	40.22	40.86	-1.6%
Shopping	132.83	135.10	-1.7%
Transport	55.30	56.13	-1.5%
TOTAL DIRECT	**430.69**	**437.70**	**-1.6%**
Indirect	153.55	155.97	-1.6%
TOTAL	**584.24**	**593.67**	**-1.6%**

Sectoral Distribution of Employment - FTEs

Sectors	2015	2014	+/- %
Accommodation	1,175	1,346	-12.7%
Food & Drink	1,572	1,633	-3.7%
Recreation	700	728	-3.9%
Shopping	1,737	1,809	-4.0%
Transport	354	368	-3.8%
TOTAL DIRECT	**5,537**	**5,884**	**-5.9%**
Indirect	1,707	1,776	-3.9%
TOTAL	**7,245**	**7,660**	**-5.4%**



Report Prepared by: DC. Date of Issue: 29/07/16