

# Suffolk's Visitor Economy Recovery Forecast Report 2022 to 2025

Prepared for: Suffolk Growth

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Prepared by:



On behalf of:



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## Introduction

Suffolk Growth would like to illustrate the projected economic recovery of Suffolk's visitor economy from the impact of the COVID 19 pandemic and more recent global and national economic conditions that have followed. The report assesses economy and employment and illustrates a modelled sector recovery trajectory through to 2025. Overall, the assessment considers the economic (value and volume) impacts and employment.

The analysis has been carried out sequentially, using different techniques and methodology. We first updated the trajectory from 2019 with 2020 and 2021 volume and value using the results from the Cambridge Model reports for Suffolk and districts. The 2022 estimates have been based on the latest Visit Britain forecasts. Finally, we have used a range of secondary sources of information illustrate the projections of growth rates for domestic and international visitors and associated expenditure up to 2025.

## This Report

This report presents the findings of our analysis. It first summarises the published results up to 2021, highlighting "recovery" progression to date. The next section estimates the likely results for 2022, based on industry forecasts. Finally, the last section of the report provides a projection of results up to 2025, based on secondary sources of research and our own modelling work.



## Methodology

### **2019-2021 Results**

We have updated the monthly impact on day and overnight tourism to different parts of the county (districts) up to 2021, based on the published Cambridge Model results. The 2021 results take account of the impact of the Omicron variant – not included in the last estimates and also consider the end of the Government's Job Retention Scheme, known known as furlough. See Appendix I for a detailed description of how Covid-19 has impacted on the Suffolk's visitor economy up to 2021.

### **2022 Results**

The 2022 results reflect concerns over the cost of living, and the squeeze on household incomes (inflation, rising fuel bills and the prospect of interest rate rises) affecting consumer confidence. We have based our assessment on the latest Visit Britain's forecast for the volume and value of domestic and inbound tourism to the UK and from the monthly and Visit England's Domestic Sentiment Tracker, designed to understand domestic intent to take short breaks and holidays both within the UK and abroad.

### **2023-2025 Results**

The projections for the years 2023-2025 have been based on historic data for international and domestic tourism up to 2019, monthly estimates and projections for 2020, 2021 and 2022 and projections of growth rates for the remainder of the forecast period using a range of secondary sources (See the references page at the end of this report). Our analysis has taken account of changes in travel demand since the start of the COVID-19 pandemic, as well as the effects of Brexit, forecasts for inflation, rising fuel bills and current and future interest rate rises.



## Suffolk County - Cambridge Model results (2019-2021)

The Cambridge Economic Impact Model examines the volume and value of tourism and the impact of that expenditure on the local economy. The 2019-2021 headline figures for Suffolk are presented below and on the table.

The results of the Cambridge Model show that the value of the tourism for Suffolk in 2021 (£1.4bn) was 59% up on 2020, but it is still 35% below the 2019 pre-pandemic levels. Employment was only 24% below pre-pandemic levels, partly due to the Government's support by means of the Job Retention Scheme, known as furlough, which secured a proportion of jobs that would have been lost otherwise.

<b>Economic Impact of Tourism – Year on year comparisons</b>				<b>Year-on-year comparison</b>	<b>Pre-pandemic levels</b>
<b>Day Trips</b>	<b>2021</b>	<b>2020</b>	<b>2019</b>	<b>2021 v 2020</b>	<b>2021 v 2019</b>
<b>Day trips Volume</b>	22,896,000	14,814,000	34,777,000	55%	-34%
<b>Day trips Value</b>	£719,379,000	£438,798,000	£1,131,729,000	64%	-36%
<b>Overnight trips</b>					
<b>Number of overnight trips</b>	1,116,000	699,000	1,734,000	60%	-36%
<b>Number of nights</b>	4,038,000	2,538,000	6,709,000	59%	-40%
<b>Overnight trip value</b>	£234,263,000	£141,562,000	£376,934,000	65%	-38%
<b>Total Value</b>	<b>£1,404,143,000</b>	<b>£885,636,000</b>	<b>£2,143,798,000</b>	<b>59%</b>	<b>-35%</b>
<b>Actual Jobs</b>	<b>33,738</b>	<b>25,840</b>	<b>44,498</b>	<b>31%</b>	<b>-24%</b>

Source: Suffolk Economic Impact of Tourism 2019 (Cambridge Model)

### Employment

Under the furlough scheme, first launched in April 2020, employees continued to receive 80pc of current salary for hours not worked, capped at £2,500 per month. The furlough scheme started to taper from July 2021, and was entirely phased out by September 2021.

As coronavirus restrictions came to an end, employment fell in the accommodation and food sectors. Data from the Office for National Statistics (ONS) shows that in October to December 2021, employment in the accommodation and food sector was still 11% below pre-pandemic levels.



## Suffolk County - Cambridge Model results (2019-2021) – Impact of the Covid pandemic

The Cambridge Economic Impact Model distributes regional activity as measured in key national surveys (GBTS, IPS, GBDVS)<sup>1</sup> to local areas using ‘drivers’ such as the accommodation stock and occupancy which influence the distribution of tourism activity at district level. The table below shows the latest published data (2021) for the value and the employment supported by the tourism activity to each district within Suffolk.

The results of the Cambridge Model show that the value of the tourism for the Suffolk districts in 2021 was between 57% and 69% up on 2020, but it is still between 33% and 37% below the 2019 pre-pandemic levels. Employment was only between 22% and 26% below pre-pandemic levels, partly due to the Government’s support by means of the Job Retention Scheme, known as furlough.

		2021	2020	2019	Year-on-year comparison 2021 v 2020	Pre-pandemic levels 2021 v 2019
<b>Mid Suffolk</b>	<b>Total Value</b>	£118,223,000	£72,346,000	£186,029,000	63%	-36%
	<b>Actual Jobs</b>	3,229	2,507	4,265	29%	-24%
<b>Babergh</b>	<b>Total Value</b>	£133,851,000	£80,742,766	£214,091,000	66%	-37%
	<b>Actual Jobs</b>	3,654	2,827	4,845	29%	-25%
<b>Ipswich</b>	<b>Total Value</b>	£177,061,240	£105,047,656	£278,540,875	69%	-36%
	<b>Actual Jobs</b>	3,972	2,885	5,402	38%	-26%
<b>East Suffolk</b>	<b>Total Value</b>	£465,548,000	£297,292,000	£695,187,000	57%	-33%
	<b>Actual Jobs</b>	11,473	9,026	14,660	27%	-22%
<b>West Suffolk</b>	<b>Total Value</b>	£349,344,000	£211,675,500	£553,848,500	65%	-37%
	<b>Actual Jobs</b>	8,280	6,333	11,027	31%	-25%



## Suffolk County - Economic modelling assumptions (2022)

The effects of the coronavirus pandemic hit household spending harder and faster than following the 2009 global financial crisis (GFC). However, household expenditure experienced a quicker recovery after the initial shock of the coronavirus (COVID-19) pandemic.

The December 2021 Domestic Sentiment Tracker saw fieldwork being undertaken during early December. In particular, we used results from the question about their trip intentions for the next 12 months compared with a time before the pandemic. We then monitored the results over subsequent waves, published monthly during 2022.

We also used data from the Bank of England Monetary Policy Reports. The October 2022 edition mentioned that inflationary pressures have intensified, driven in part by a sharp reduction in gas supply from Russia to Europe and a steep rise in energy and other commodity prices. Household real incomes have fallen this year as a result. Real post-tax household income is forecast to fall by 1.5% in 2022 despite the government support aimed at lessening the impact of rising energy bills.

Inbound visits and spend were sharply down in January 2022 due to the impact of the Omicron variant. Visits and spend then picked up quickly from February to April. Spend per visit was higher than the pre-pandemic norm, due to longer average length of stay as well as inflation. Visits from Europe recovered faster, relative to 2019, than from long haul markets, particularly from East Asia.

For the full calendar year, inbound visits are forecast to increase to 26.7 million and spending to £21.6 billion. These are 65% and 76% respectively of the visits and spend levels seen in 2019.



## Suffolk County - Economic modelling assumptions (2023 - 2025)

### **Domestic visits**

The October 2022 edition of the Bank of England Monetary Policy Report explains that that inflationary pressures have intensified, driven in part by a sharp reduction in gas supply from Russia to Europe and a steep rise in energy and other commodity prices. Higher energy prices are expected to push inflation to 13% by the end of the year and to remain at very elevated levels throughout much of 2023, before falling to the 2% target two years ahead.

Household real incomes have fallen and continue to do so throughout this year as a result. Real post-tax household income is forecast to fall by 1.5% in 2022 despite the government support aimed at lessening the impact of rising energy bills – initially capped for two years but later changed to April 2023. In addition, mortgage rates have gone up substantially and most households will face higher interest rates relatively quickly.

Results from the latest wave of the VisitBritain domestic sentiment tracker (October 2022) about their perceptions with regard to the cost of living crisis show that 79% of those surveyed said that they felt the worst was yet to come, with a further 13% saying they believed that things are going to stay the same. The majority of UK adults are either 'cautious – being very careful' or they have already been 'hit hard' by the cost of living crisis.

Moreover, the situation is expected to deteriorate further in 2023, with household incomes falling by 2.25% before a lacklustre 0.75% increase in 2024. Overall consumer consumption is not expected to see declines quite as steep as overall household incomes, with the Bank anticipating that those able to do so will dip into their savings in order to help pay for the increased cost of living.





## Suffolk County - Economic modelling assumptions (2023 - 2025)

### **Overseas visits**

Inbound visits and spend were sharply down in January 2022 due to the impact of the Omicron variant. Visits and spend then picked up quickly from February to April. Spend per visit was higher than the pre-pandemic norm, due to longer average length of stay as well as inflation. The latest forecast from VisitBritain assumes inbound visits to increase to 26.7 million and spending to £21.6 billion. These are 65% and 76% respectively of the visits and spend levels seen in 2019.

Visits from Europe, Middle East and North America are expected to recover faster than other long haul markets, with volumes at around 75% to 80% of those achieved in 2019. Trips from East Asia are not expected to reach even 40% of its 2019 volumes by the end of 2022. The gap between regions is expected to narrow as we move through 2023 and 2024 with key generating markets in Europe, North America and the Middle East potentially returning to where they were ahead of the pandemic, while travel from much of Asia is still expected to be about 20% lower than it was in 2019 by 2024.

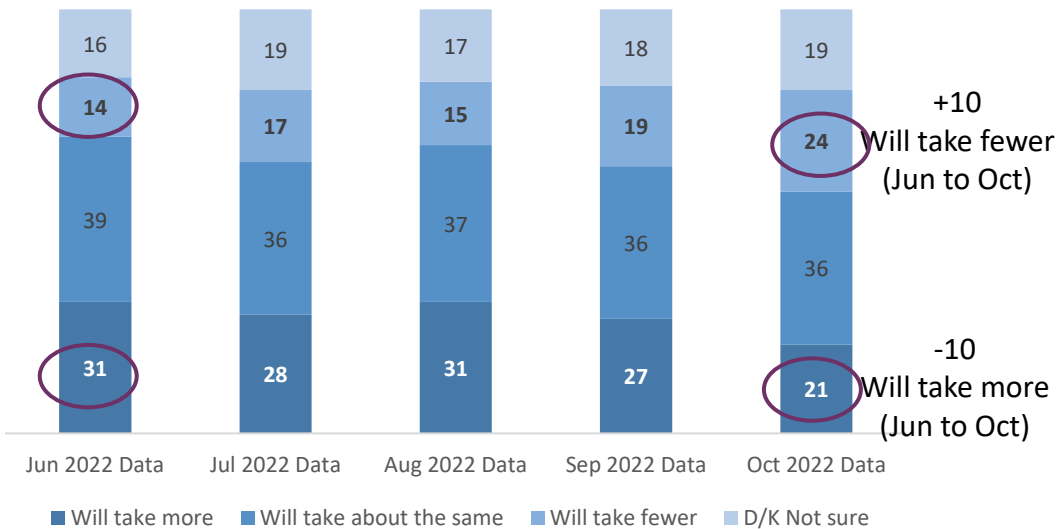


## Suffolk County - Economic modelling assumptions (2023)

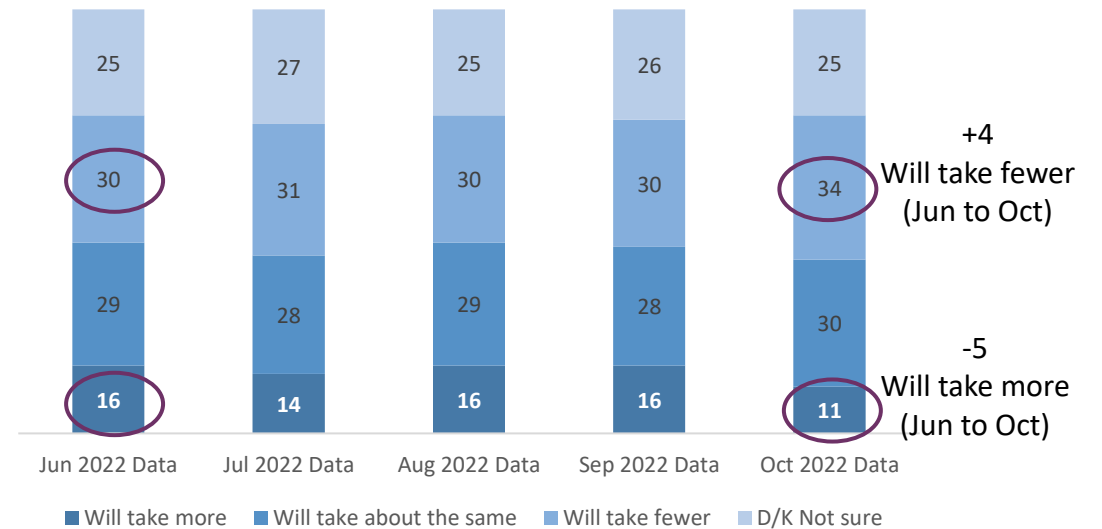
### Forecast 2023

The most recently published wave of the Domestic Sentiment Tracker saw fieldwork being undertaken during early October. In particular, we used results from the question about their trip intentions for the next 12 months compared with a time before the pandemic. The results show a 10 point drop in the intention to take more domestic overnight trips in 2023, compared to pre-pandemic and a 10% in the proportion who expect to take fewer domestic overnight trips during 2023. The equivalent propositions for overseas trips are 4% and 5% respectively.

Number of **UK overnight trips** likely to take in next 12 months compared to pre-pandemic, Percentage, October 2022, UK

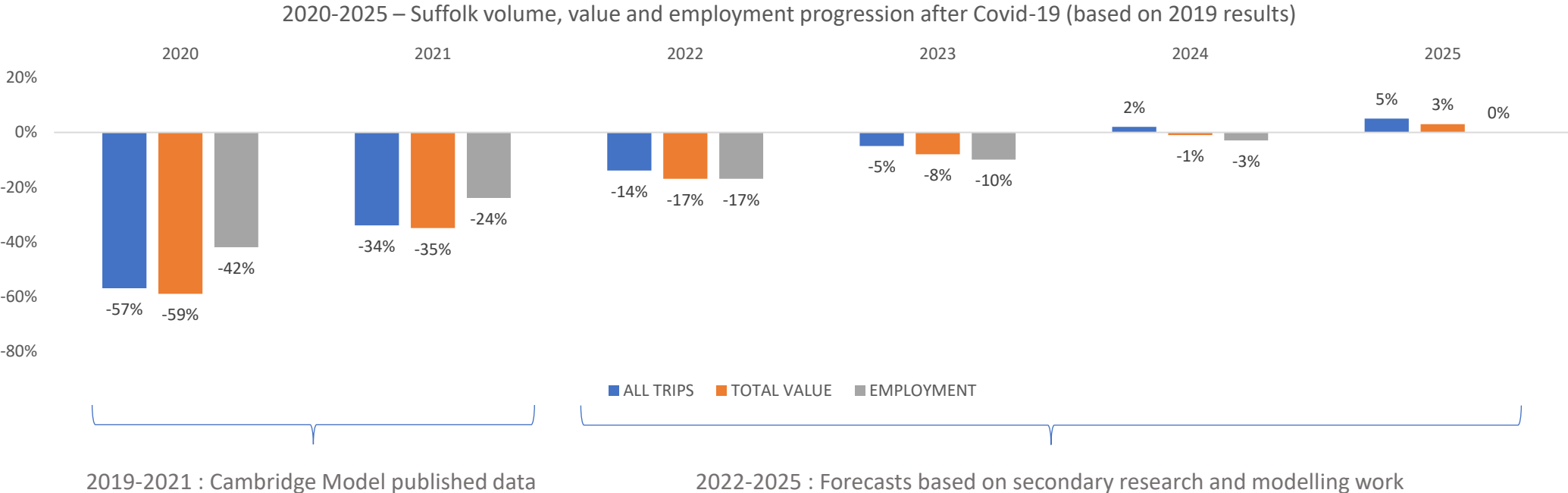


Number of **Overseas overnight trips** likely to take in next 12 months compared to pre-pandemic, Percentage, October 2022, UK



### Suffolk County - Economic modelling assumptions to 2025

As we have seen in the previous section, there are a number of factors (inflation, energy costs, interest rates, etc.) that are likely to influence the speed of the recovery. There is a degree of unpredictability and therefore some caution is required when interpreting the forecasted results to 2025. Based on our analysis, we estimate that travel demand will not return to 2019 levels until 2024, with value and employment not fully recovered until 2025.



## Suffolk County – Economic modelling results for 2022

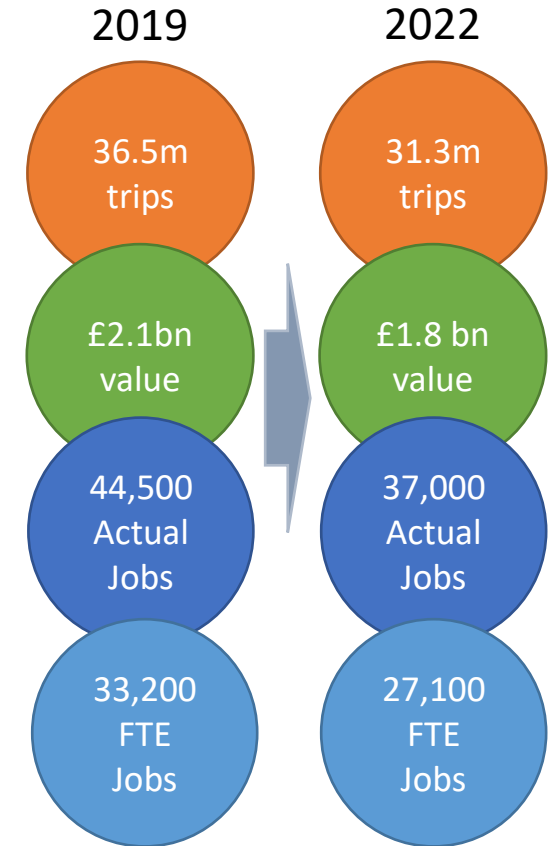
### 2022 Modelling results

The results of our modelled impact on day and overnight tourism to Suffolk show that the local visitor economy will reach just under £1.8bn in value in 2022, just over 80% of the total annual value to the county's visitor economy before the start of the pandemic.

2019	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>36,501,000</b>	<b>£2,137,201,000</b>	<b>33,200</b>	<b>44,500</b>
Ipswich	3,966,800	£309,579,000	4,600	6,000
East Suffolk	12,442,900	£772,652,500	12,200	16,200
Babergh	4,315,800	£233,528,800	3,900	5,300
Mid Suffolk	4,073,500	£205,876,200	3,500	4,700
West Suffolk	11,702,000	£615,564,500	9,000	12,300

2022	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>31,283,000</b>	<b>£1,774,034,000</b>	<b>27,100</b>	<b>37,000</b>
Ipswich	3,386,000	£243,148,000	3,500	4,700
East Suffolk	10,703,000	£622,097,000	9,700	13,100
Babergh	3,693,000	£201,821,000	3,300	4,600
Mid Suffolk	3,485,000	£176,605,000	2,900	4,000
West Suffolk	10,016,000	£530,363,000	7,700	10,600

LOSS TRADE	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>-14%</b>	<b>-17%</b>	<b>-18%</b>	<b>-17%</b>
Ipswich	-14%	-21%	-24%	-22%
East Suffolk	-14%	-19%	-20%	-19%
Babergh	-14%	-14%	-15%	-13%
Mid Suffolk	-14%	-14%	-17%	-15%
West Suffolk	-15%	-14%	-14%	-14%

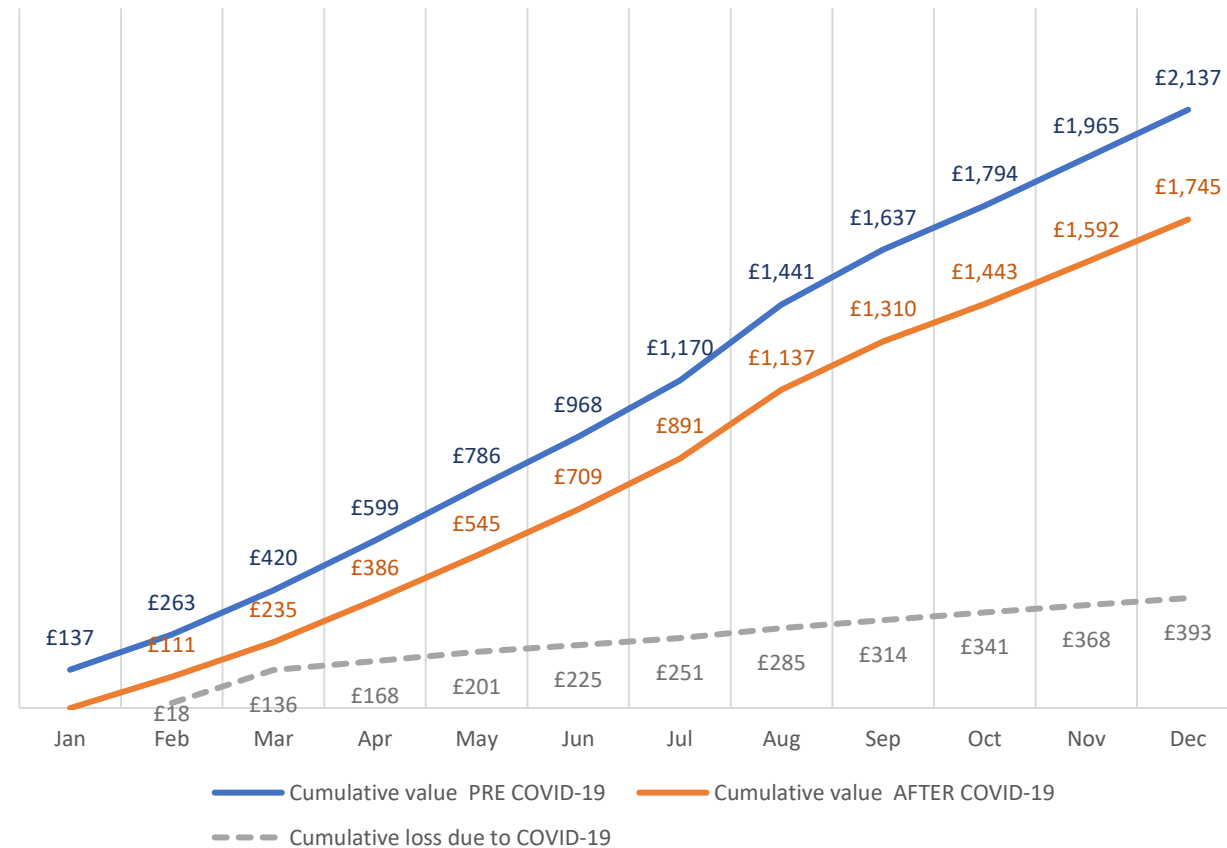


## Suffolk County – Economic modelling results for 2022

### Suffolk's visitor economy – 2022

The results of our modelled monthly impact on day and overnight tourism to Suffolk show that the local visitor economy is set to lose £393 million in 2022, from the £2.1 billion achieved in 2019, before the start of the COVID-19 pandemic.

2022 cumulative monthly value (£m) of visitor economy before and after Covid-19



## Suffolk County – Economic modelling results for 2023

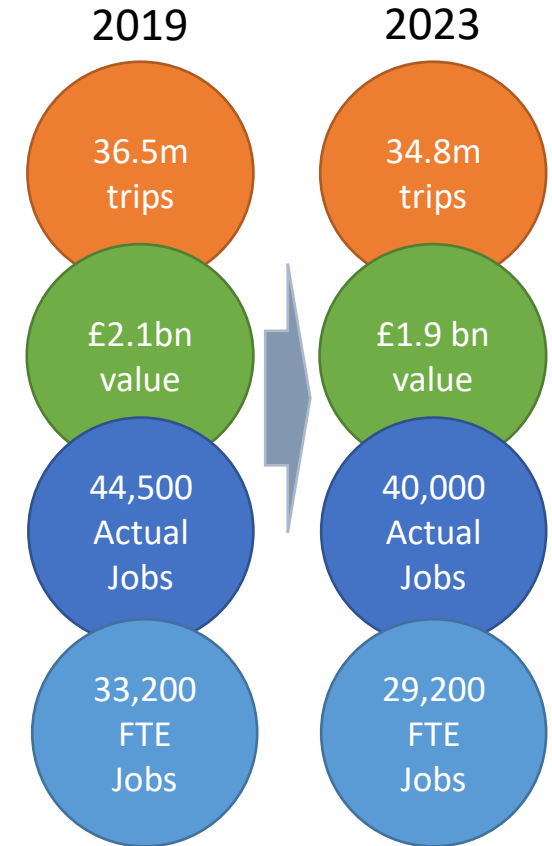
### 2023 Modelling results

The results of our modelled monthly impact on day and overnight tourism to Suffolk show that the local visitor economy will reach £1.94bn in value in 2023, about 92% of the total annual value to the county's visitor economy before the start of the pandemic.

2019	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>36,501,000</b>	<b>£2,137,201,000</b>	<b>33,200</b>	<b>44,500</b>
Ipswich	3,966,800	£309,579,000	4,600	6,000
East Suffolk	12,442,900	£772,652,500	12,200	16,200
Babergh	4,315,800	£233,528,800	3,900	5,300
Mid Suffolk	4,073,500	£205,876,200	3,500	4,700
West Suffolk	11,702,000	£615,564,500	9,000	12,300

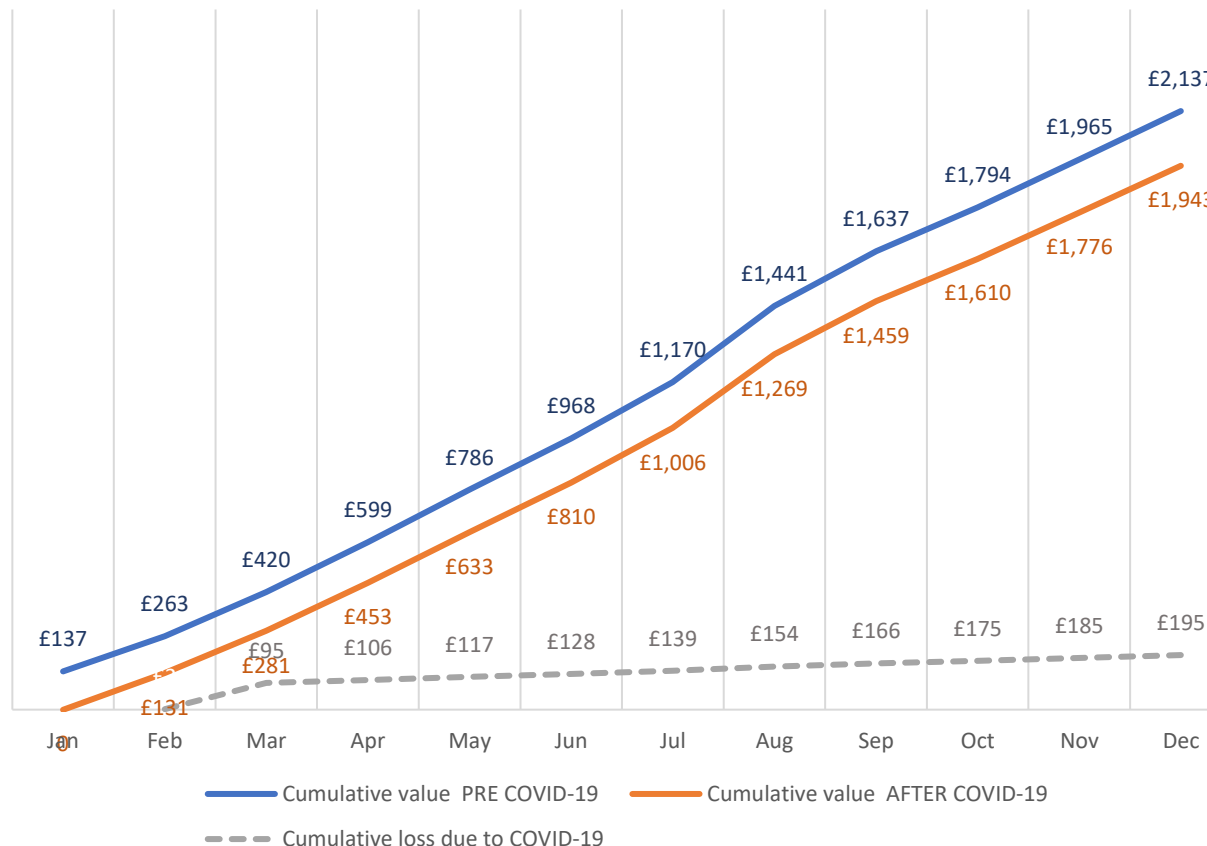
2023	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>34,758,000</b>	<b>1,942,575,000</b>	<b>29,200</b>	<b>40,000</b>
Ipswich	3,773,000	268,063,000	3,800	5,100
East Suffolk	11,862,000	676,790,000	10,400	14,100
Babergh	4,108,000	221,554,000	3,500	4,900
Mid Suffolk	3,877,000	193,953,000	3,200	4,400
West Suffolk	11,139,000	582,216,000	8,300	11,500

LOSS TRADE	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>-5%</b>	<b>-8%</b>	<b>-12%</b>	<b>-10%</b>
Ipswich	-4%	-13%	-17%	-15%
East Suffolk	-5%	-12%	-15%	-13%
Babergh	-5%	-5%	-10%	-8%
Mid Suffolk	-5%	-6%	-9%	-6%
West Suffolk	-5%	-5%	-8%	-7%



## Suffolk County – Economic modelling results for 2023

2023 cumulative monthly value (£m) of visitor economy before and after Covid-19



### Suffolk's visitor economy – 2023

The results of our modelled monthly impact on day and overnight tourism to Suffolk show that the local visitor economy is set to lose £195 million in 2023, from the £2.1 billion achieved in 2019, before the start of the COVID-19 pandemic.



## Suffolk County – Economic modelling results for 2024

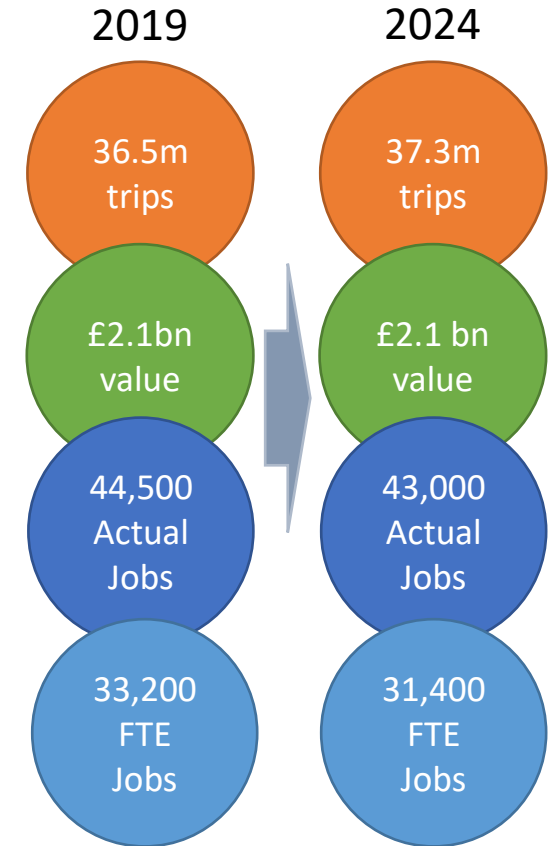
### 2024 Modelling results

The results of our modelled monthly impact on day and overnight tourism to Suffolk show that the local visitor economy will reach just under £2.1n in value in 2024, almost level with the total annual value to the county's visitor economy before the start of the pandemic.

2019	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>36,501,000</b>	<b>£2,137,201,000</b>	<b>33,200</b>	<b>44,500</b>
Ipswich	3,966,800	£309,579,000	4,600	6,000
East Suffolk	12,442,900	£772,652,500	12,200	16,200
Babergh	4,315,800	£233,528,800	3,900	5,300
Mid Suffolk	4,073,500	£205,876,200	3,500	4,700
West Suffolk	11,702,000	£615,564,500	9,000	12,300

2024	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>37,308,000</b>	<b>2,124,880,000</b>	<b>31,400</b>	<b>43,000</b>
Ipswich	4,050,000	303,568,000	4,200	5,700
East Suffolk	12,712,000	726,679,000	11,000	14,900
Babergh	4,412,000	243,762,000	3,800	5,300
Mid Suffolk	4,165,000	213,943,000	3,400	4,700
West Suffolk	11,970,000	636,928,000	9,000	12,400

LOSS TRADE	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>2%</b>	<b>-1%</b>	<b>-5%</b>	<b>-3%</b>
Ipswich	3%	-2%	-9%	-5%
East Suffolk	2%	-6%	-10%	-8%
Babergh	2%	4%	-3%	-0%
Mid Suffolk	2%	4%	-3%	-0%
West Suffolk	2%	3%	-0%	1%



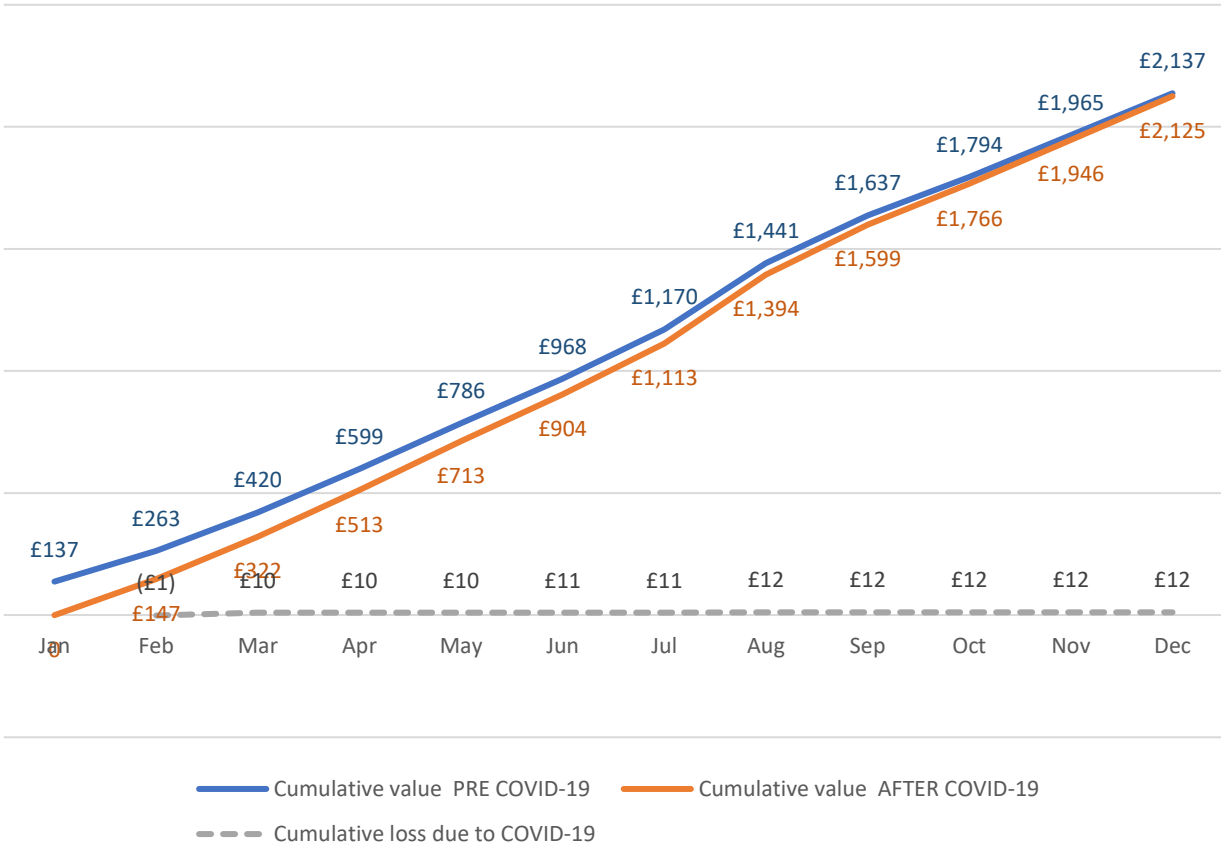


## Suffolk County – Economic modelling results for 2024

### Suffolk’s visitor economy – 2024

The results of our modelled monthly impact on day and overnight tourism to Suffolk show that the local visitor economy is set to lose just £12 million in 2024, from the £2.1 billion achieved in 2019, before the start of the COVID-29 pandemic.

2024 cumulative monthly value (£m) of visitor economy before and after Covid-19



## Suffolk County – Economic modelling results for 2025

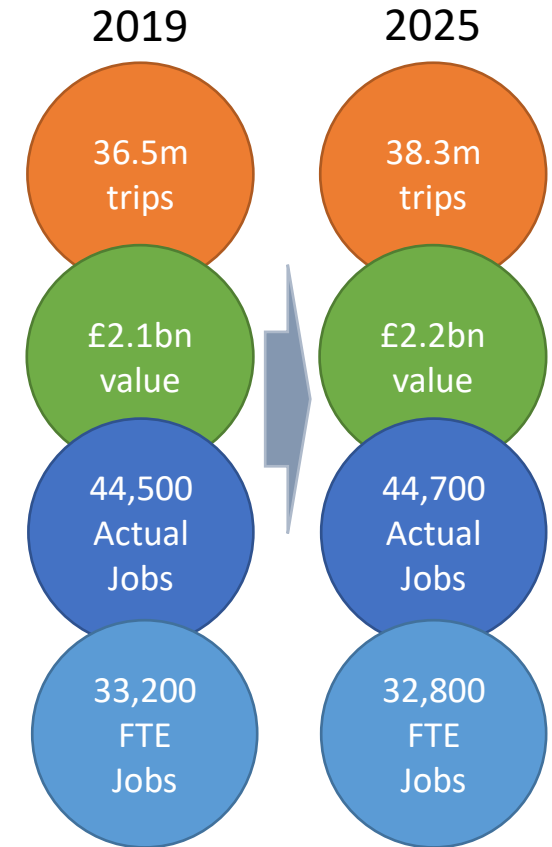
### 2025 Modelling results

The results of our modelled monthly impact on day and overnight tourism to Suffolk show that the local visitor economy will reach just over £2.2bn in value in 2025, about 3% above the total annual value to the county's visitor economy before the start of the pandemic.

2019	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>36,501,000</b>	<b>£2,137,201,000</b>	<b>33,200</b>	<b>44,500</b>
Ipswich	3,966,800	£309,579,000	4,600	6,000
East Suffolk	12,442,900	£772,652,500	12,200	16,200
Babergh	4,315,800	£233,528,800	3,900	5,300
Mid Suffolk	4,073,500	£205,876,200	3,500	4,700
West Suffolk	11,702,000	£615,564,500	9,000	12,300

2025	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>38,322,000</b>	<b>£2,202,583,000</b>	<b>32,800</b>	<b>44,700</b>
Ipswich	4,160,000	£314,488,000	4500	6000
East Suffolk	13,057,000	£810,786,000	12200	16300
Babergh	4,532,000	£239,904,000	3800	5300
Mid Suffolk	4,278,000	£210,557,000	3400	4700
West Suffolk	12,295,000	£626,848,000	8900	12400

LOSS TRADE	ALL TRIPS	TOTAL VALUE	EMPLOYMENT	
			FTEs	Actual Jobs
<b>SUFFOLK</b>	<b>5%</b>	<b>3%</b>	<b>0%</b>	<b>0%</b>
Ipswich	6%	2%	2%	0%
East Suffolk	5%	5%	0%	-1%
Babergh	5%	3%	3%	0%
Mid Suffolk	5%	2%	3%	0%
West Suffolk	5%	2%	1%	-1%

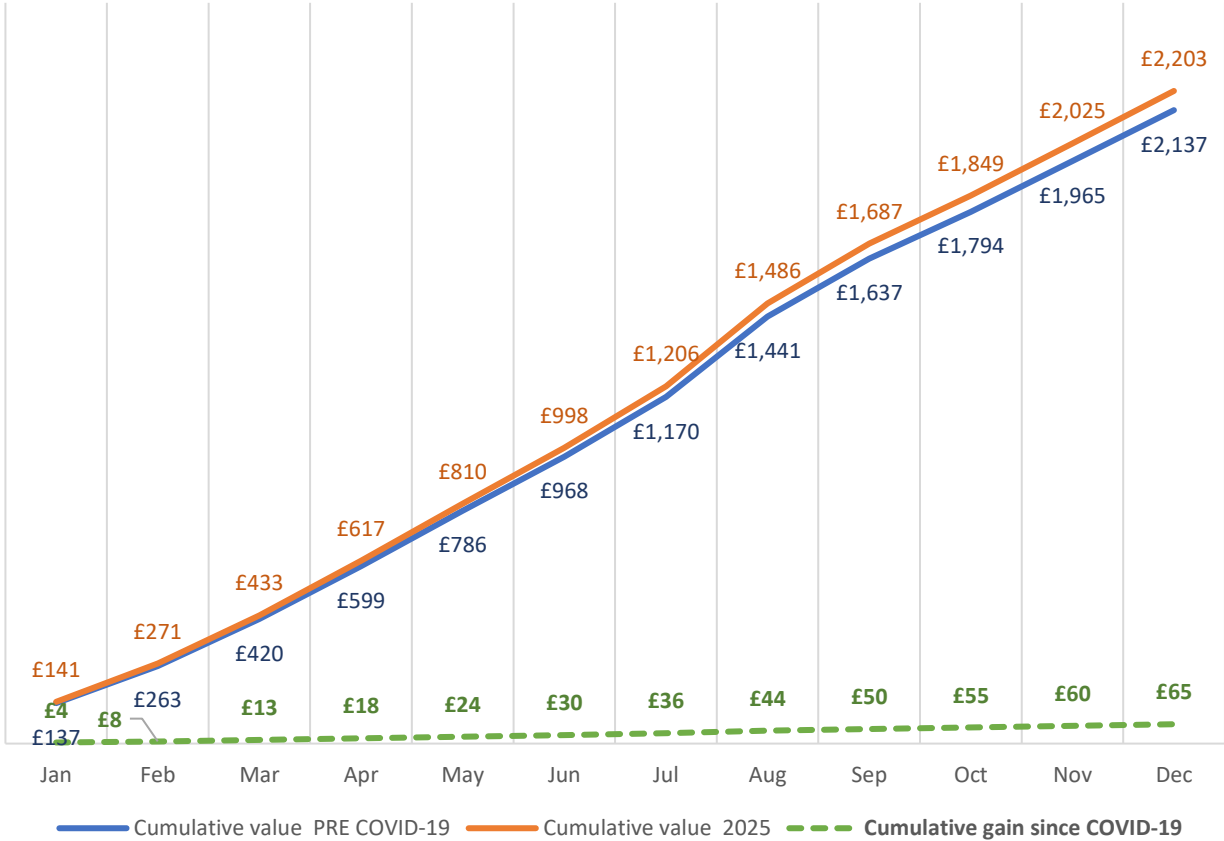


Suffolk County – Economic modelling results for 2025

2025 cumulative monthly value (£m) of visitor economy before and after Covid-19

**Suffolk’s visitor economy – 2025**

The results of our modelled monthly impact on day and overnight tourism to Suffolk show that the local visitor economy is set to gain £65 million in 2025, from the £2.1 billion achieved in 2019, before the start of the COVID-29 pandemic.



## Appendix I – National lockdown laws

### **Covid-19: Summary of national lockdown laws between March and December 2020.**

- **Phase one: first national lockdown** - England was in national lockdown between late March and June 2020.
- **Phase two: minimal lockdown restrictions** - Most lockdown restrictions were lifted on 4 July.
- **Phase three: reimposing restrictions** - On 14 September, England's gathering restriction was tightened and people were once again prohibited from meeting more than six people socially.
- **Phase four: second national lockdown** - On 5 November, national restrictions were reintroduced in England.
- **Phase five: reintroducing a tier system** - On 2 December, the tier system was reintroduced.

### **Covid-19 – Summary of impacts on the visitor economy for 2020**

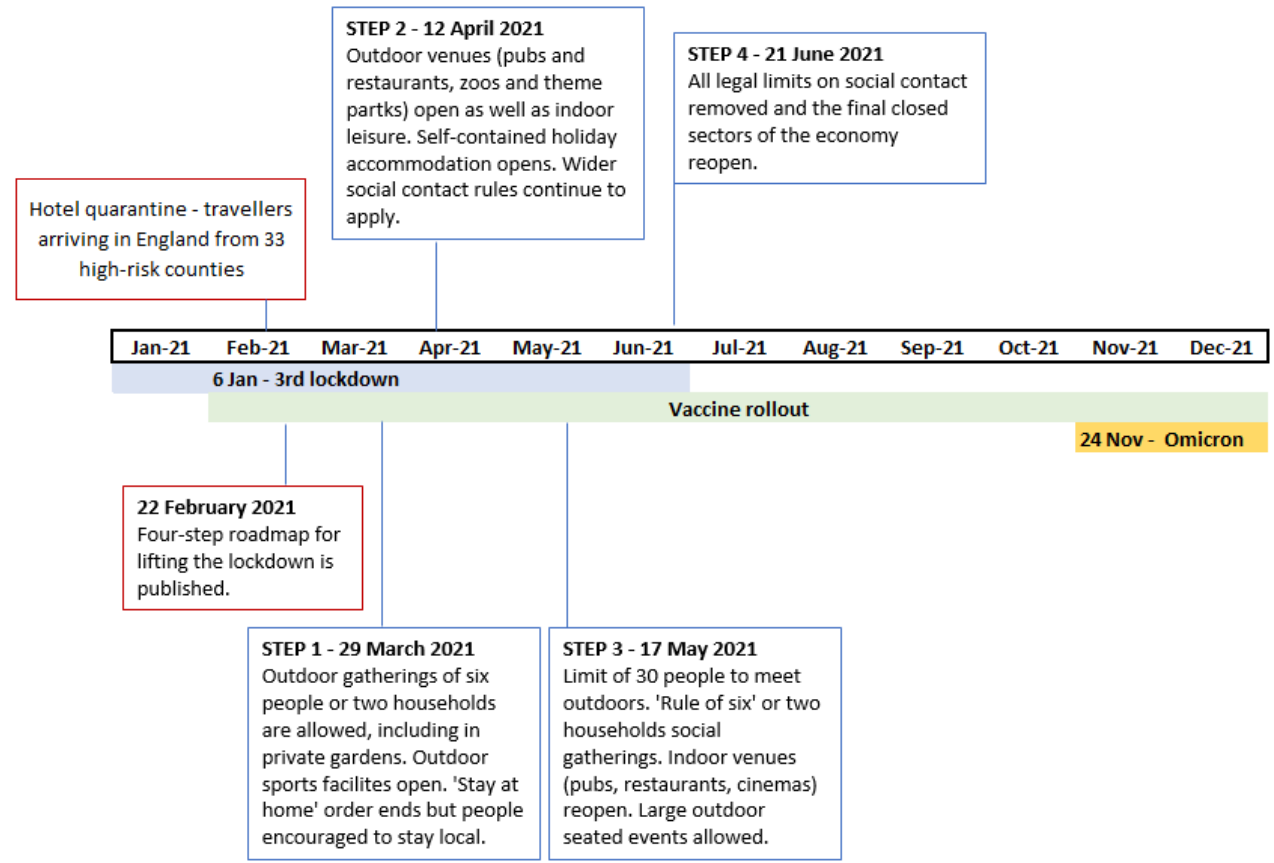
- Our analysis assumes a ten-week lockdown ending at the start of July and with very limited activity. It then assumes a period in July – September when businesses start to open but social distancing remains in place and tourism spend remains well below pre-COVID levels and dipped again in November.
- Parts of the tourism industry reopened in time to exploit the main summer school holiday window, from late July through to early September and to pick up on the shoulder months of late September through to the end of October, including the October half term.



## Appendix I – National lockdown laws

### Covid-19: Summary of national lockdown laws during 2021

Our analysis assumes an initial lock down starting in January, followed by a four-step roadmap for a gradual lifting of movement and travel restrictions.



## Appendix II – National forecasts

### **2020 National forecast (VisitBritain)**

According to VisitBritain estimates, spending by domestic tourism in Britain in 2020 reach £34.0 billion (down 63% compared to 2019). The drop in expenditure is based on a decline of 60% for overnights and 64% for leisure day trips, although with different patterns throughout the year and by journey purpose.

According to these estimates, the UK received 11.1 million inbound visits in 2020, a 73% decline from the visit levels seen in 2019. In 2020 inbound visitors to the UK spent a total of £6.2 billion, a decline of 78% on 2019 results.

### **2021 National forecast (VisitBritain)**

As was the case with the 2020 results, the model will make use of the latest forecast from VisitBritain, relating to 2021. This assumes an estimated £16.0bn in domestic overnight tourism spending (64% growth on 2020 and 65% of the 2019 level) and £41.0bn in leisure day trip spending (69% growth on 2020 and 61% of the 2019 level).

Inbound tourism for the full year 2021 is estimated at 6.4 million visits, 42% down of 2020 and 16% of the 2019 level (or 84% down on 2019). Expenditure by inbound visitors reached £5.6bn , 10% down on 2020 and 20% of the 2019 level (or 80% down on 2019).

### **2022 National Forecast (VisitBritain)**

For the full calendar year, inbound visits are forecast to increase to 26.7 million and spending to £21.6 billion. These are 65% and 76% respectively of the visits and spend levels seen in 2019. At the time of publication, no estimates for domestic overnight tourism were available.



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