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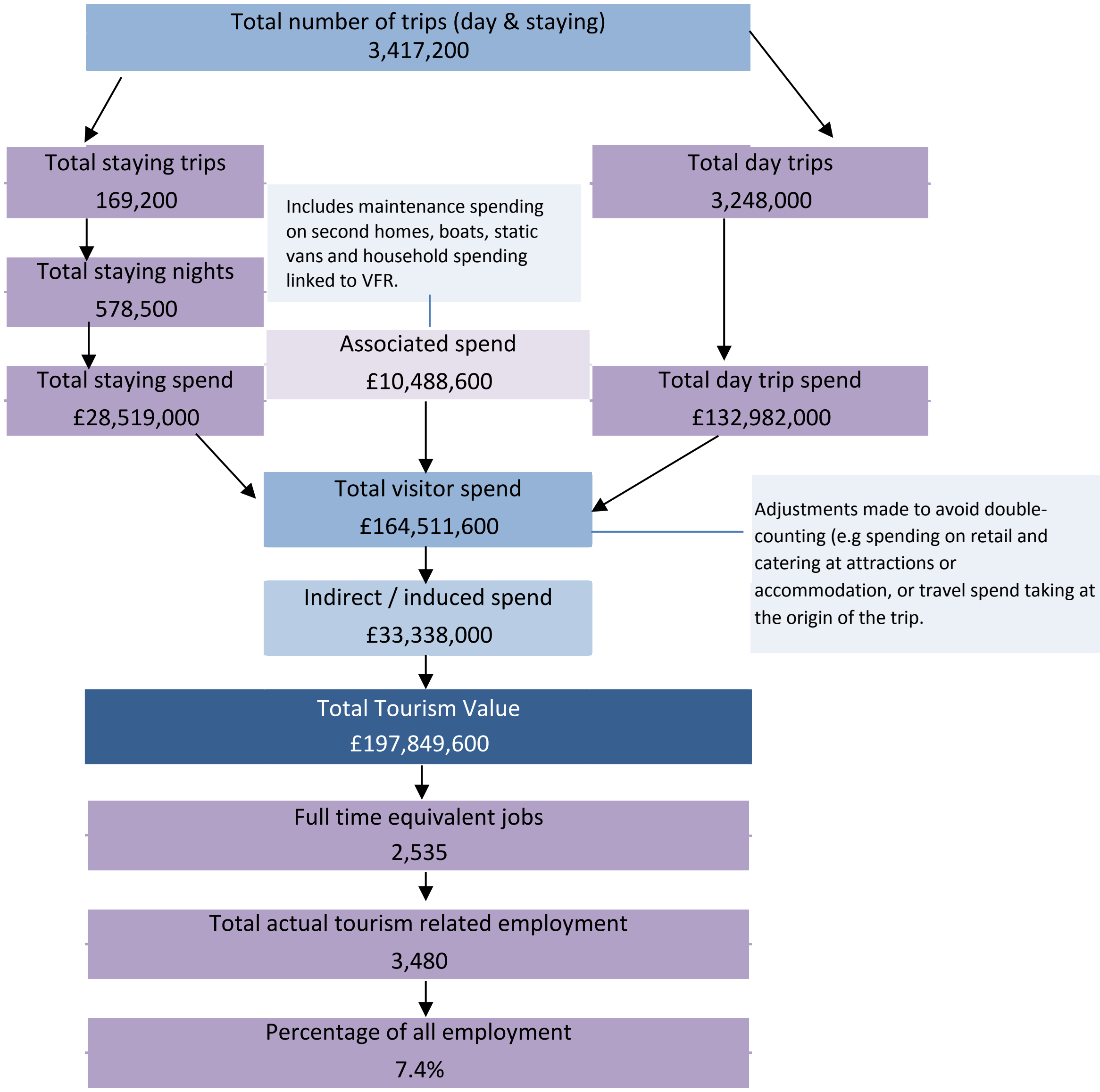
Economic Impact of Tourism

Epping Forest - 2014

Produced by:

Destination Research
Sergi Jarques, Director

Economic Impact of Tourism – Headline Figures   Epping Forest - 2014

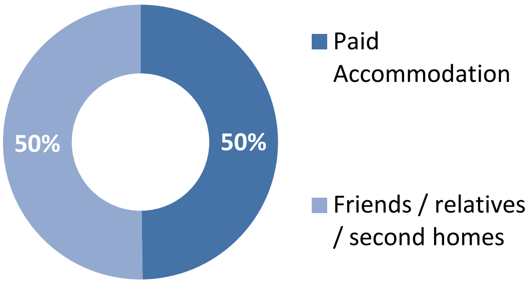


Economic Impact of Tourism – Year on year comparisons

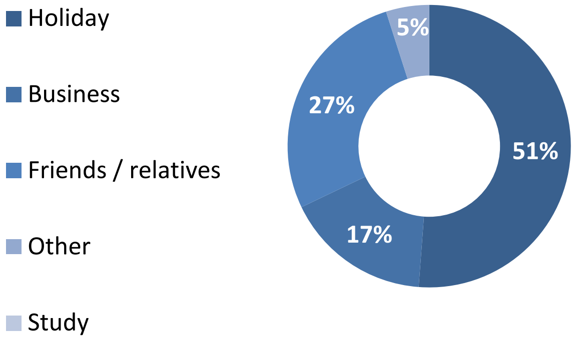
Day Trips	2013	2014	Annual variation
Day trips Volume	3,086,000	3,248,000	5.2%
Day trips Value	£130,649,000	£132,982,000	1.8%
Overnight trips			
Number of trip	158,700	169,200	6.6%
Number of nights	537,400	578,500	7.6%
Trip value	£25,465,000	£28,519,000	12.0%
Total Value	£193,240,100	£197,849,600	2.4%
Actual Jobs	3,406	3,480	2.2%

	2013	2014	Variation
Average length stay (nights x trip)	3.39	3.42	1%
Spend x overnight trip	£ 160.46	£ 168.55	5%
Spend x night	£ 47.39	£ 49.30	4%
Spend x day trip	£ 42.34	£ 40.94	-3%

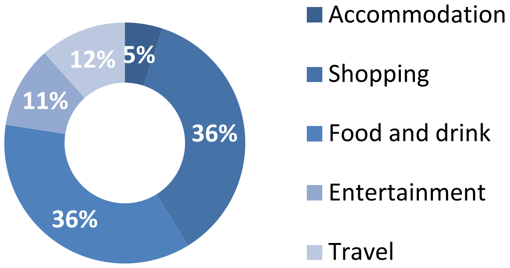
Type of Accommodation



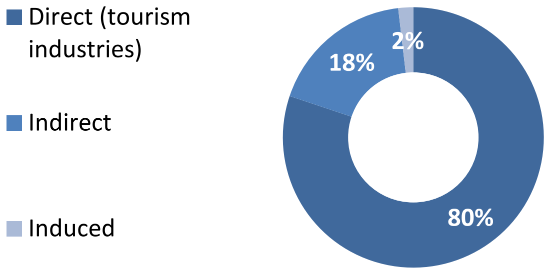
Trips by Purpose



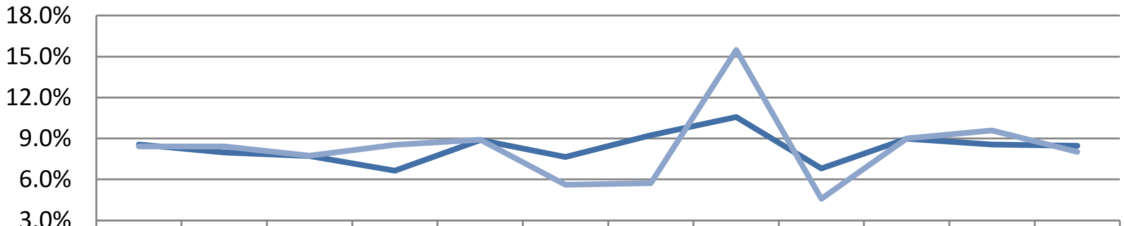
Breakdown of expenditure



Type of employment

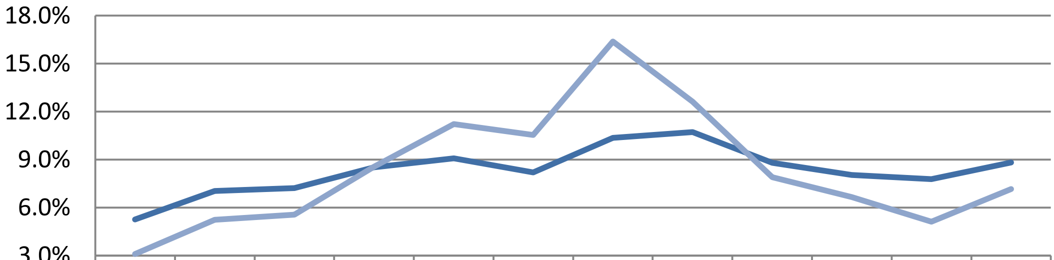


Seasonality - Day visitors



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	8.6%	8.0%	7.7%	6.6%	8.9%	7.6%	9.2%	10.6%	6.8%	9.0%	8.6%	8.5%
Day spend	8.4%	8.4%	7.7%	8.5%	8.9%	5.6%	5.7%	15.5%	4.6%	9.0%	9.6%	8.0%

Seasonality - Overnight visitors



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	5.2%	7.0%	7.2%	8.5%	9.1%	8.2%	10.4%	10.7%	8.8%	8.0%	7.8%	8.8%
Overnight spend	3.1%	5.2%	5.5%	8.6%	11.2%	10.5%	16.4%	12.6%	7.9%	6.7%	5.1%	7.1%

Contents

Contextual analysis

Domestic tourism

In 2014, British residents took 92.6 million overnight trips in England, totalling 273 million nights away from home, with expenditure of £18.1 billion. The number of domestic trips was 9% lower than in 2013, and the amount spent fell by 3% (in nominal terms).

The East of England region experienced a 1% increase in overnight trips during 2014. Bednights were up 10% on 2013 and expenditure was up by 14%. This resulted in an increase in the average length of trips (the number of night per trip) from 3.1 nights per trip in 2013 to 3.3 in 2014. The average spend per night was up from £51.9 per night in 2013 to £53.4 in 2014. The region received a few more visitors in 2014 than in the previous year. More importanlt, however, those who did visit stayed for longer and spent more per night than in 2013.

Visits from overseas

The number of visits to the UK in 2014 reached a record 34.4 million, after several years of growth since 2010. Average spend per visit was £636 in 2014, down on the peak of £650 per visit in 2013, reflecting the relative weakness of sterling leading up to 2013.

London is a key destination for inbound visitors to the UK. In 2014, 17.4 million visitors spent time in the capital, spending just short of £11.8bn. This represents 54% of all inbound visitor spending. The rest of England attracted 14.2 million inbound visitors who spent an estimated £7.3bn, representing 33% of all inbound visitor spend.

Overseas trips to the East of Engalnd region were 5% up on 2013 to reach 2.1 million overnight trips. The total number of nights was up by 17% to reach 16.8 million in 2014. Spend was also up, by 9% to £967 million in 2014.

The International Passenger Survey (IPS) is conducted by Office for National Statistics and is based on face- to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. The number of interviews conducted in England in 2014 was 34,754. This large sample size allows reliable estimates to be produced for various groups of passengers despite the low proportion of travellers interviewed. The IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK. The sample for East of England was 2,383 interviews.

How accurate is the Regional data?

The regional data has to be interpreted with lots of caution, as the IPS has never been designed to be able to produce highly accurate results at regional level. Whilst the survey gives good precision at the national level, regional breakdowns of the data will almost inevitably lead to less reliable results. For example although the sample size for Merseyside was 322 in 2004 the margin of error for visits to this area is 40.9%. We have to bear in mind that although the IPS matches accurately the overall volume of overseas visitors coming to the UK, the IPS does not give a precise picture of where these overseas visitors stayed during their stay in the UK. This is because some interviews are not done in a few regional airports. For example until 2005 no interviews were carried at Prestwick and Liverpool airports, which may have resulted into less accurate estimates for Scotland and Northern England.

The International Passenger Survey (IPS) data is a key driver for the Cambridge model and as outlined above, needs to be used with caution when looking at regional level data. We have applied a 3 year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Day visitors

During 2014, GB residents took a total of 1,585 million Tourism Day Visits to destinations in England, Scotland or Wales. Around £54 billion was spent during these trips.

The largest proportion of visits were taken to destinations in England (1,345 million visits or 85% of the total) while 8% of visits (127 million) were taken to Scottish destinations and 6% to places in Wales (90 million). The distribution of expenditure during visits broadly reflects this pattern.

The regional distribution of visits generally reflects the population distribution with the notable exception of London which is the destination for 17% of visits but place of residence for just 13% of the population. Within the English regions, the highest volume of visits was taken in London (274 million visits) where the total value of day visits during 2014 was around £10.7 billion.

The volume and value of Tourism Day Visits in England decreased slightly between 2013 and 2014 from 1,370 million to 1,345 million with a similar level of decrease in expenditure. The East of England region experienced a 1% decrease in the volume of trips between 2013 (131 million trips) and 2014 (130 million trips) and a 5% decrease in the overall value (£4.1bn to £3.9bn).

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	54,000	40%	10,200	30%	64,200	38%
Self catering	1,000	1%	200	1%	1,200	1%
Camping	6,000	4%	600	2%	6,600	4%
Static caravans	2,000	1%	0	0%	2,000	1%
Group/campus	0	0%	400	1%	400	0%
Paying guest	0	0%	0	0%	0	0%
Second homes	1,000	1%	200	1%	1,200	1%
Boat moorings	0	0%	0	0%	0	0%
Other	2,000	1%	7,200	21%	9,200	5%
Friends & relatives	69,000	51%	15,400	45%	84,400	50%
Total 2014	**135,000**		**34,200**		**169,200**	
Comparison 2013	**128,000**		**30,700**		**158,700**	
Difference	**5%**		**11%**		**7%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	97,000	26%	37,700	19%	134,700	23%
Self catering	1,000	0%	4,000	2%	5,000	1%
Camping	27,000	7%	1,600	1%	28,600	5%
Static caravans	10,000	3%	100	0%	10,100	2%
Group/campus	1,000	0%	4,400	2%	5,400	1%
Paying guest	0	0%	0	0%	0	0%
Second homes	2,000	1%	5,100	3%	7,100	1%
Boat moorings	0	0%	0	0%	0	0%
Other	4,000	1%	10,900	5%	14,900	3%
Friends & relatives	235,000	63%	138,700	68%	373,700	65%
Total 2014	**376,000**		**202,500**		**578,500**	
Comparison 2013	**339,000**		**198,400**		**537,400**	
Difference	**11%**		**2%**		**8%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£10,487,000	60%	£1,885,000	17%	£12,372,000	43%
Self catering	£52,000	0%	£303,000	3%	£355,000	1%
Camping	£801,000	5%	£60,000	1%	£861,000	3%
Static caravans	£388,000	2%	£0	0%	£388,000	1%
Group/campus	£40,000	0%	£178,000	2%	£218,000	1%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£59,000	0%	£152,000	1%	£211,000	1%
Boat moorings	£0	0%	£0	0%	£0	0%
Other	£42,000	0%	£707,000	6%	£749,000	3%
Friends & relatives	£5,735,000	33%	£7,631,000	70%	£13,366,000	47%
Total 2014	**£17,603,000**		**£10,916,000**		**£28,519,000**	
Comparison 2013	**14,616,000**		**10,849,000**		**25,465,000**	
Difference	**20%**		**1%**		**12%**	

Serviced accommodation includes hotels, guesthouses, inns, B&B and serviced farmhouse accommodation. Paying guest refers to overseas visitors staying in private houses, primarily language school students. Other trips includes nights spent in transit, in lorry cabs and other temporary accommodation.

Staying Visitors - Purpose of Trip

Trips by Purpose

		UK		Overseas		Total	
Holiday		78,000	58%	8,100	24%	86,100	51%
Business		21,000	16%	7,100	21%	28,100	17%
Friends & relatives		31,000	23%	14,700	43%	45,700	27%
Other		4,000	3%	4,300	13%	8,300	5%
Study		0	0%	0	0%	0	0%
Total	**2014**	**135,000**		**34,200**		**169,200**	
Comparison	**2013**	**128,000**		**30,700**		**158,700**	
Difference		**5%**		**11%**		**7%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		253,000	67%	41,700	21%	294,700	51%
Business		47,000	13%	22,700	11%	69,700	12%
Friends & relatives		68,000	18%	113,500	56%	181,500	31%
Other		8,000	2%	24,600	12%	32,600	6%
Study		0	0%	0	0%	0	0%
Total	**2014**	**376,000**		**202,500**		**578,500**	
Comparison	**2013**	**339,000**		**198,400**		**537,400**	
Difference		**11%**		**2%**		**8%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£8,679,000	49%	£2,314,000	21%	£10,993,000	39%
Business		£4,340,000	25%	£2,067,000	19%	£6,407,000	22%
Friends & relatives		£4,189,000	24%	£5,386,000	49%	£9,575,000	34%
Other		£395,000	2%	£1,149,000	11%	£1,544,000	5%
Study		£0	0%	£0	0%	£0	0%
Total	**2014**	**£17,603,000**		**£10,916,000**		**£28,519,000**	
Comparison	**2013**	**£14,616,000**		**£10,849,000**		**£25,465,000**	
Difference		**20%**		**1%**		**12%**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

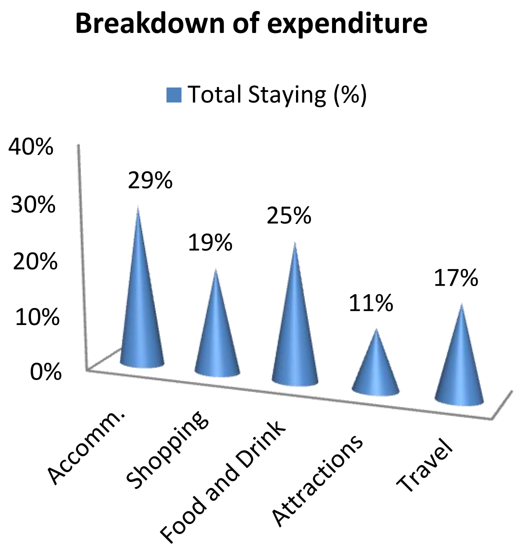
		Trips	Spend
Urban visits		2,552,000	111,163,000
Countryside visits		696,000	21,819,000
Coastal visits		0	0
Total	**2014**	**3,248,000**	**132,982,000**
Comparison	**2013**	**3,086,000**	**130,649,000**
Difference		**5%**	**2%**

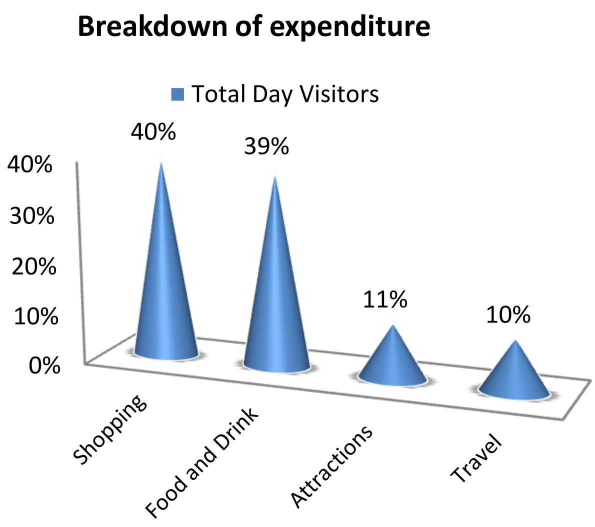
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£5,228,000	£2,244,000	£4,585,000	£1,879,000	£3,667,000	£17,603,000
Overseas tourists		£2,938,000	£3,122,000	£2,483,000	£1,257,000	£1,116,000	£10,916,000
Total Staying		£8,166,000	£5,366,000	£7,068,000	£3,136,000	£4,783,000	£28,519,000
Total Staying (%)		29%	19%	25%	11%	17%	100%
Total Day Visitors		£0	£53,042,000	£51,402,000	£14,624,000	£13,914,000	£132,982,000
Total Day Visitors		0%	40%	39%	11%	10%	100%
Total	**2014**	**£8,166,000**	**£58,408,000**	**£58,470,000**	**£17,760,000**	**£18,697,000**	**£161,501,000**
%		**5%**	**36%**	**36%**	**11%**	**12%**	**100%**
Comparison	**2013**	**6,898,000**	**58,378,000**	**56,401,000**	**16,879,000**	**17,556,000**	**156,112,000**
Difference		**18.4%**	**0.1%**	**3.7%**	**5.2%**	**6.5%**	**3.5%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£236,000	£0	£557,600	£9,695,000	£10,488,600

Spend on second homes is assumed to be an average of £2,000 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,000 on berthing charges, servicing and maintenance and upgrading of equipment. Static van spend arises in the case of vans purchased by the owner and used as a second home. Expenditure is incurred in site fees, utility charges and other spending and is estimated at £2,000. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £175 per visit has been assumed based on national research for social

Direct Turnover Derived From Trip Expenditure

Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending.

	Staying Visitor	Day Visitors	Total
Accommodation	£8,307,000	£1,028,000	£9,335,000
Retail	£5,312,000	£52,512,000	£57,824,000
Catering	£6,856,000	£49,860,000	£56,716,000
Attractions	£3,261,000	£15,668,000	£18,929,000
Transport	£2,870,000	£8,349,000	£11,219,000
Non-trip spend	£10,488,600	£0	£10,488,600
Total Direct 2014	**£37,094,600**	**£127,417,000**	**£164,511,600**
Comparison 2013	**£35,572,100**	**£125,318,000**	**£160,890,100**
Difference	**4%**	**2%**	**2%**

Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Supplier and Income Induced Turnover

	Staying Visitor	Day Visitors	Total
Indirect spend	£6,764,000	£21,254,000	£28,018,000
Non trip spending	£2,203,000	£0	£2,203,000
Income induced	£1,881,000	£1,236,000	£3,117,000
Total 2014	**£10,848,000**	**£22,490,000**	**£33,338,000**
Comparison 2013	**£10,388,000**	**£21,962,000**	**£32,350,000**
Difference	**4%**	**2%**	**3%**

Income induced spending arises from expenditure by employees whose jobs are supported by tourism spend.

Total Local Business Turnover Supported by Tourism Activity – Value of Tourism

	Staying Visitor	Day Visitors	Total
Direct	£37,094,600	£127,417,000	£164,511,600
Indirect	£10,848,000	£22,490,000	£33,338,000
Total Value 2014	**£47,942,600**	**£149,907,000**	**£197,849,600**
Comparison 2013	**£45,960,100**	**£147,280,000**	**£193,240,100**
Difference	**4%**	**2%**	**2%**

Employment

Employment

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

Direct employment

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Accommodation		127	24%	16	1%	142	7%
Retailing		39	8%	388	28%	428	22%
Catering		98	19%	712	51%	810	42%
Entertainment		51	10%	246	17%	297	15%
Transport		15	3%	45	3%	60	3%
Non-trip spend		191	37%	0	0%	191	10%
Total FTE	**2014**	**521**		**1,407**		**1,929**	
Comparison	**2013**	**512**		**1,378**		**1,890**	
Difference		**2%**		**2%**		**2%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		187	27%	23	1%	211	8%
Retailing		59	8%	582	28%	641	23%
Catering		147	21%	1,069	51%	1,216	44%
Entertainment		72	10%	347	17%	419	15%
Transport		22	3%	63	3%	85	3%
Non-trip spend		217	31%	0	0%	217	8%
Total Actual	**2014**	**705**		**2,085**		**2,789**	
Comparison	**2013**	**681**		**2,041**		**2,723**	
Difference		**3%**		**2%**		**2%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		163	386	549
Induced jobs		34	22	57
Total FTE	**2014**	**197**	**409**	**606**
Comparison	**2013**	**192**	**407**	**599**
Difference		**3%**	**1%**	**1%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		186	441	626
Induced jobs		39	26	65
Total Actual	**2014**	**225**	**466**	**691**
Comparison	**2013**	**219**	**464**	**683**
Difference		**3%**	**1%**	**1%**

Total Jobs

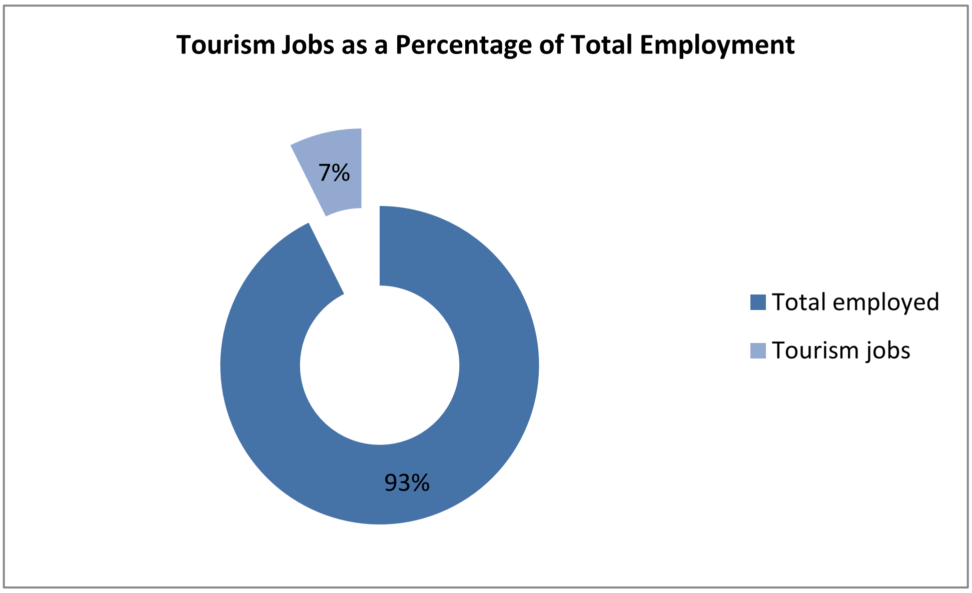
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		521	73%	1,407	77%	1,929	76%
Indirect		163	23%	386	21%	549	22%
Induced		34	5%	22	1%	57	2%
Total FTE	**2014**	**718**		**1,816**		**2,535**	
Comparison	**2013**	**704**		**1,785**		**2,489**	
Difference		**2%**		**2%**		**2%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		705	76%	2,085	82%	2,789	80%
Indirect		186	20%	441	17%	626	18%
Induced		39	4%	26	1%	65	2%
Total Actual	**2014**	**929**		**2,551**		**3,480**	
Comparison	**2013**	**901**		**2,505**		**3,406**	
Difference		**3%**		**2%**		**2%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		47,297	47,297	47,297
Tourism jobs		929	2,551	3,480
Proportion all jobs		**2%**	**5%**	**7%**
Comparison	**2013**	**901**	**2,505**	**3,406**
Difference		**3%**	**2%**	**2%**



Economic Impact of Tourism – Headline Figures Epping Forest - 2014

The key 2014 results of the Economic Impact Assessment are:

3.4 million trips were undertaken in the area
3.2 million day trips
0.2 million overnight visits

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

£162 million spent by tourists during their visit to the area
£13 million spent on average in the local economy each month.

£29 million generated by overnight visits
£133 million generated from irregular day trips.

£198 million spent in the local area as result of tourism, taking into account multiplier effects.

3,480 jobs supported, both for local residents from those living nearby.
2,789 tourism jobs directly supported
691 non-tourism related jobs supported linked to multiplier spend from tourism.

Appendix I - Introduction about Cambridge Model

This report examines the volume and value of tourism and the impact of that expenditure on the local economy. The figures were derived using the Cambridge Economic Impact Model and the research was undertaken by Destination Research.

The model utilises information from national tourism surveys and regionally based data held by Destination Research. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

Limitations of the Model

The methodology and accuracy of the above sources varies. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area changes year on year. This is as a result of the random probability nature of the methodology. As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.

It should be noted that the model cannot take into account any leakage of expenditure from tourists taking day trips out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas, in locations receiving significant numbers of day visitors from London, there is likely to be an underestimate in relation to the number of overseas day visitors staying in holiday accommodation in London.

Whilst it is important to be aware of these issues, we are confident that the estimates we have produced are as reliable as is practically possible within the constraints of the information available.

Rounding
All figures used in this report have been rounded. In some tables there may therefore be a slight discrepancy between totals and sub totals.

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

- Great Britain Tourism Survey (GBTS) - information on tourism activity by GB residents;
- International Passenger Survey (IPS) information on overseas visitors to the United Kingdom;
- Day Visits in the annual Great Britain Day Visitor Survey using information on visits lasting more than 3 hours and taken on an irregular basis

These surveys provide information down to a regional level. In order to disaggregate data to a local level the following information sources are used:

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Mid- 2014 estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;
- Selected data on the countryside and coast including, national designations and length of the coastline.

Staying Visitors

The GBTS provides information on the total number of trips to the region and the relative proportions using different types of accommodation. By matching these figures to the supply of such accommodation, the regional average number of trips per bedspace or unit of accommodation can be derived. The IPS provides information on the total number of trips by overseas visitors to the region.

Day Visitors

Information on day trips at the regional level is available from the Day Visits in Great Britain survey. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

Impact of tourism expenditure

This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the district.

The GBTS, IPS and Day Visits to Great Britain survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

The New Earnings Survey which provides information on wage levels by industry sector and region; An internal business database which includes data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others. By applying the breakdown to the estimates of visitor spending, the model generates estimates of total direct spending.

Evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover – for example, some expenditure on food and drink actually takes place in inns and hotels that fall in the accommodation sector and within attractions. More significantly, expenditure on travel costs associated with individual trips is equally likely to take place at the origin of the trip as the destination. Therefore the model assumes that only 40% of travel expenditure accrues to the destination area.

Number of full time job equivalents

Having identified the value of turnover generated by visitor spending, it is possible to estimate the employment associated with that spending. Wages for staff and drawings for the proprietors will absorb a proportion of that turnover. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated. The New Earnings Survey provides data from which the average costs by business sector, adjusted to take account of regional differences, can be calculated.

After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job.

Number of Actual Jobs

The model generates estimates of full time equivalent jobs based on visitor spending. However, the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending. In general, the conversion factor varies around 1.5 in those sectors.

The indirect and induced jobs arise across a much wider range of employment sectors. Therefore, the average 1.16 for all sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs.

The employment estimates generated by the model include both self employed and employed people supported by visitor expenditure. The model also includes an estimate of the additional jobs arising in the attractions sector, which are not related to visitor expenditure. However, the numbers do not include other tourism-related employment such as jobs in local authorities arising from their tourism functions, e.g. tourist information staff, additional public health, parks and gardens, public conveniences, maintenance sections and jobs arising from capital investment in tourism facilities.

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Registered in England No. 9096970
VAT Registration No. GB 192 3576 85

45 Colchester Road
Manningtree
CO11 2BA

Sergi Jarques
Director
Tel: 01206 392528
info@destinationresearch.co.uk
www.destinationresearch.co.uk