

## Guidance notes 2020

### General points of note concerning modelled data and 2020 outputs:

1. **All surveys are subject to error.** This is because surveys are based on a sample and the sample may not (to a greater or lesser extent) reflect the behaviours or opinions of everyone that the researcher's interested in. So, survey data can under or over-estimate actual figures. This means that for any given year, data may have been over or underestimated. It also means that the decreases or in fact increases seen between years in trips, nights and spend may be overestimated. In reality, the changes could be much smaller.
2. **Differences are not always statistically significant.** Statisticians can calculate whether differences between different groups of people or differences over time are statistically significant. If the differences between two groups or two years are statistically significant, this means that you would not expect to see those differences by chance *i.e.* those two years or groups are genuinely different and an underlying factor or factors will account for the difference. So, the key things to remember here are that:
  - Any rises or drops may be exaggerated.
  - Any rises or drops in trips, nights and spend may have happened by chance and do not necessarily indicate an underlying issue.
  - Trends over time should be observed over a longer period *i.e.* over a good few years. Care should be taken not to over-interpret the significance of changes between "adjacent years" (*i.e.* 2019 and 2018). In addition, as we are dealing with smaller areas in some instances, relatively small changes in volume can look large in terms of proportion but might be, in a broader context, less significant than at first glance.
  - For 2020 outputs a range of local survey data, national data and forecasts have been applied to estimate the annual outputs and changes from previous years are attributed to the Covid-19 pandemic.
  - General themes coming through the data for 2020 included; Cornwall performed better than other South West areas, coastal areas performed better than rural and urban areas, self-catering accommodation performed better than serviced.
  - Whilst it was of course a poor year all businesses were able to open for five months of the year, including the peak months, and open under tiers for two months. Food and drink and retail businesses which were able to open earlier than accommodation businesses (albeit with restrictions) adapted as the lockdowns progressed to increase their turnover.

### 2020 methodology points of note

This year's outputs are for the Covid hit year of 2020 and as a result our approach to the project needed to change. There has been very limited national survey data available for the subject year due to the pandemic and certainly nothing at a regional level or below, so as a result 2019 outputs were used as the foundation from which 2020 outputs were estimated.

Covid impact data was gathered by TSWRC from February 2020 onwards which was used alongside other local survey data and national level outputs and forecasts and applied to the 2019 outputs for each area to model the 2020 input data. Once the input data was calculated the Cambridge Model was then used to produce the outputs for 2020 and as such, they are comparable with previous years whilst noting the changes above.

Employment figures show a large decrease compared to the 2019 data. However, many more tourism jobs will have been supported by Government support schemes in place in 2020 due to the pandemic e.g. furlough scheme. So the 2020 figure is an estimate of jobs supported by the 2020 visitor spend rather than an actual change in the employment numbers when compared to previous years.

## **Cambridge Methodology & Data Sources (2019 and previous outputs).**

The methodology used within the model remains the same as in previous years – using a top-down allocation model based on a variety of data sources, including attractions data, accommodation figures, population estimates, earnings estimates, etc.

Wherever possible, 2019 data has been used to input into the model.

Day visits have been modelled from the regional GBDVS figure and outputs are not comparable with years prior to 2011 due to changes in the survey methodology. Please note that 2011 day visits have also been re-modelled in 2012 due to changes to GBDVS and will not match the originally published figures for 2011. Revised spreadsheet data for 2011 was provided with the final 2012 figures.

As in previous reports, some occupancy levels for districts were assumed equal to the county average because of a lack of data.

Figures for second homes are taken from the 2011 Census, as there is no newer data source.

The Employment and Earnings figures were taken from ASHE 2019.

Visitation data was taken from IPS and GBTS, however, this data has been adjusted where it was not supported by local evidence or the scale of change was considered to be unrealistic or without foundation compared to historical data.

### **Seasonality estimates.**

The estimates contained within the report have been calculated as shown below.

- UK Staying trips nights and spend – Regional and county level data for trips, nights and spend by the month of trip derived from GBTS have been applied to the annual figures for each area to produce seasonality estimates. Because of the smaller samples at a county level 3 year averages have been applied.
- Overseas Staying trips nights and spend – Regional data for trips, nights and spend by the month of trip derived from IPS have been applied to the annual figures for each area to produce seasonality estimates.
- Day visits and spend – Regional data for the month of trip and month of spend derived from GBDVS have been applied to the annual figures for each area to produce seasonality estimates.