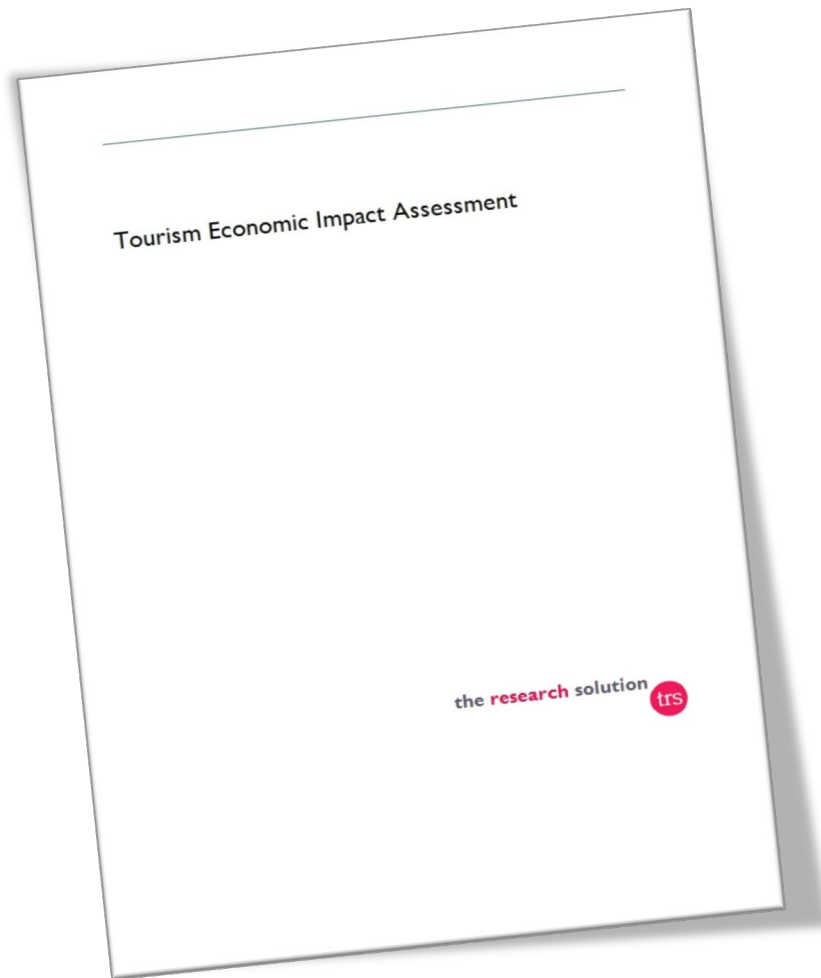


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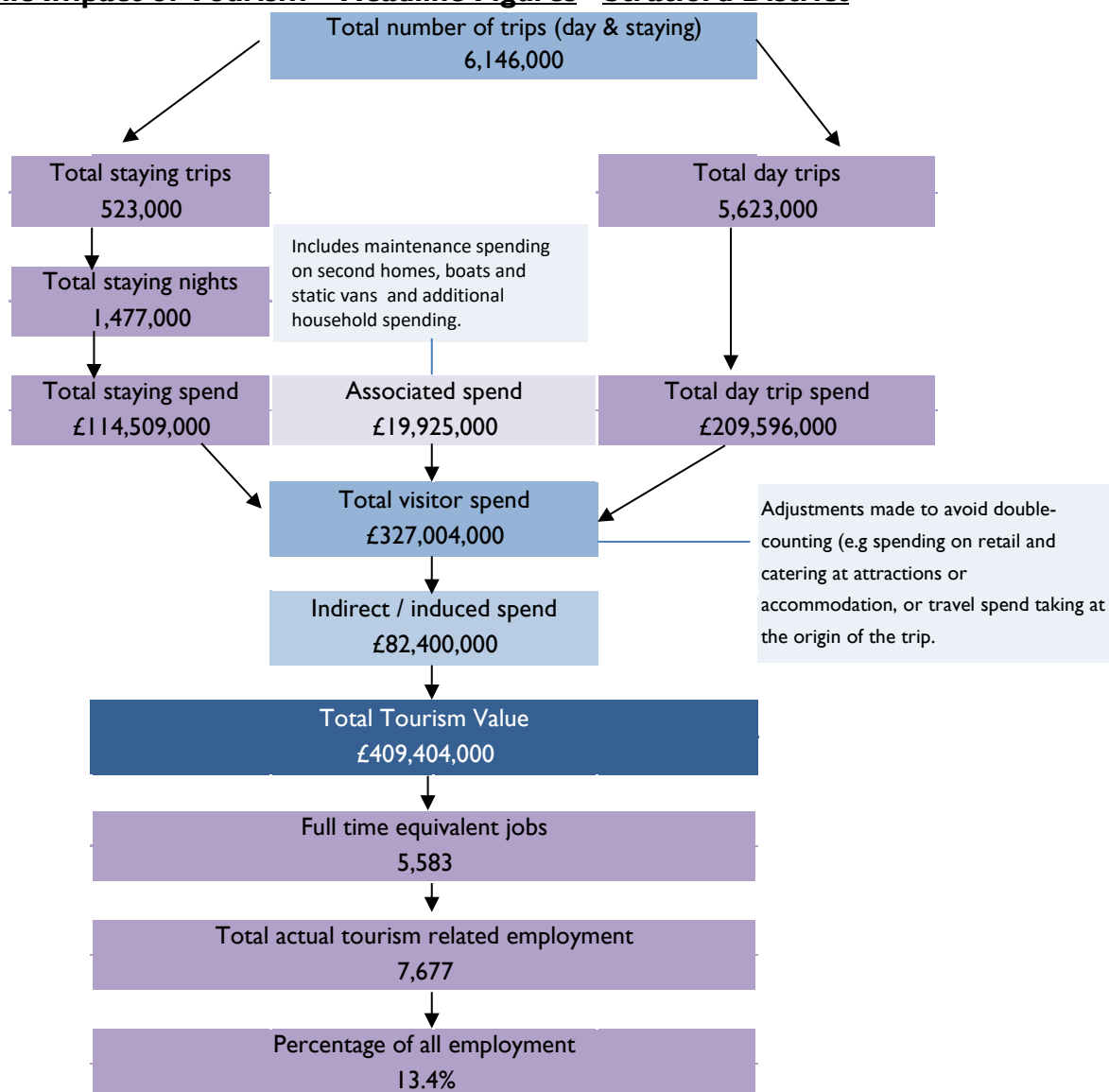


Produced by:

The Research Solution
Christine King, Director

Economic Impact of Tourism
Stratford District - 2017
On behalf of Stratford-on-Avon District Council

Economic Impact of Tourism – Headline Figures Stratford District

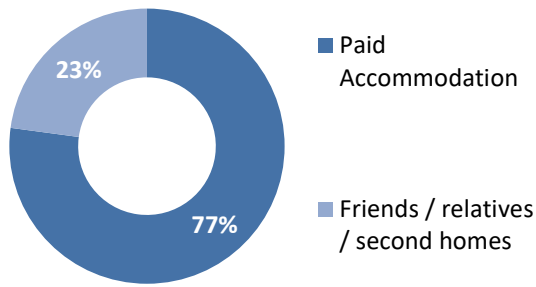


Economic Impact of Tourism – Year on year comparisons

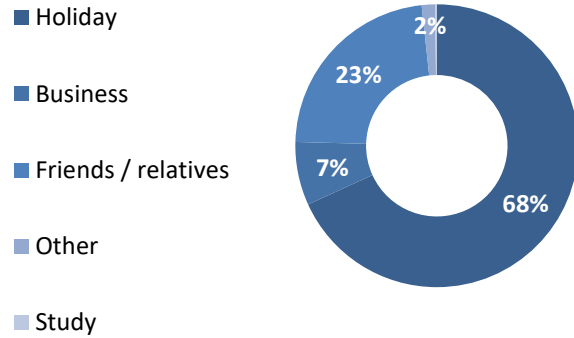
<u>Day Trips</u>	2016	2017	Annual variation
Day trips Volume	5,241,000	5,623,000	7.3%
Day trips Value	£200,308,000	£209,596,000	4.6%
<u>Overnight trips</u>			
Number of trips	515,000	523,000	1.6%
Number of nights	1,440,000	1,477,000	2.6%
Trip value	£110,843,000	£114,509,000	3.3%
Total Value	£393,593,000	£409,404,000	4.0%
Actual Jobs	7,382	7,677	4.0%

	2016	2017	Variation
Average length stay (nights x trip)	2.80	2.82	1.0%
Spend x overnight trip	£ 215.23	£ 218.95	1.7%
Spend x night	£ 76.97	£ 77.53	0.7%
Spend x day trip	£ 38.22	£ 37.27	-2.5%

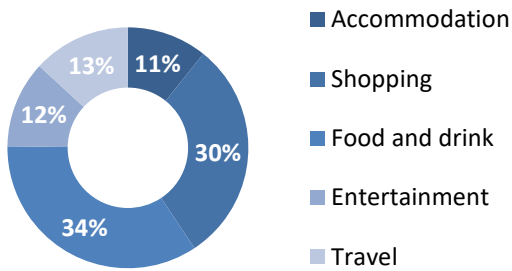
Type of Accommodation



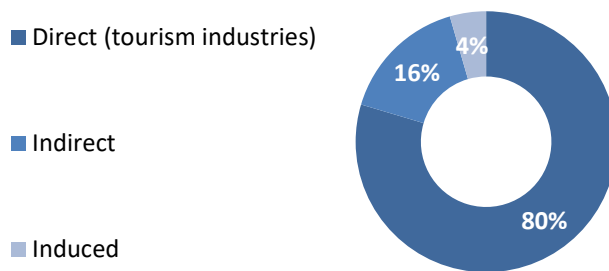
Trips by Purpose



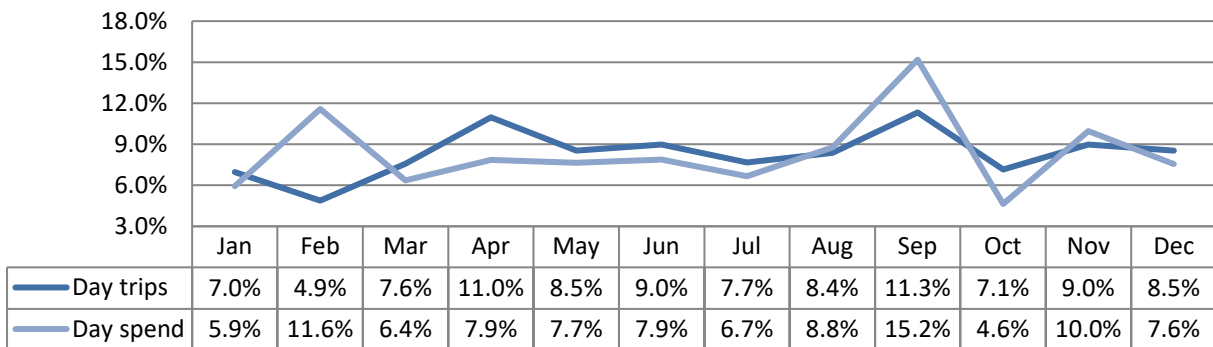
Breakdown of expenditure



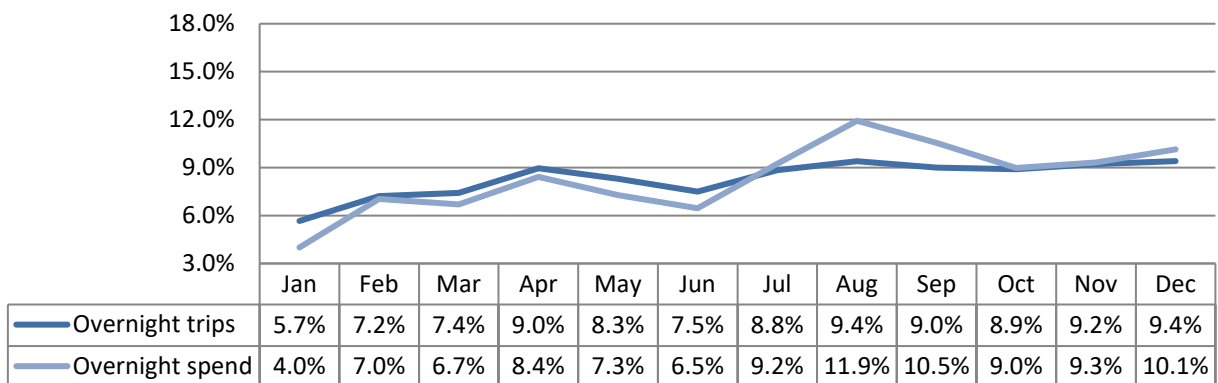
Type of employment



Seasonality - Day visitors



Seasonality - Overnight visitors



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Contextual analysis

INTRODUCTION

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2016 and provides comparative data against previously published data. The results are derived using the Cambridge Economic Impact Model under licence by The Research Solution Ltd based on the latest data from national tourism surveys and regionally/locally based data.

CONTEXTUAL ANALYSIS

The three key surveys used to measure volume and expenditure from tourism trips are the GB Tourism Survey (for domestic overnight trips), the International Passenger Survey (IPS) for visits from overseas, and the GB Day Visitor Survey (GBDVS), which measures tourism day visits.

Domestic tourism

In 2017, British residents took 104.2 million overnight trips in England, totalling 299 million nights away from home. The number of domestic trips was 5% higher than in 2016, and nights were up by 4% compared to the 2016. Holiday Trips in England in 2017 increased by 9% compared to 2016, with 48.9 million trips recorded.

The volume of trips to the West Midlands region in 2017 was 11% down on 2016, the number of nights decreased by 16% to 18.4 million nights. Value was also down by 9%. The GB Tourism Survey data is a key driver for the Cambridge model. However, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends. The 2017 volume and value of trips to Warwickshire are based on three-year average (2015-2017) and are compared to the 2016 performance, which are an average of 2014-2016 average.

Visits from overseas

The number of visits in 2017 grew 4% to a record 39.2 million, after several years of growth since 2010. The number of visitor nights spent in the UK increased by 3% in 2017 to 286 million, with the average number of nights per visit declined slightly from 7.4 in 2016 to 7.3 in 2017. The value of spending increased by 9% to £24.5 billion. Average spend per visit was £7625 in 2017, up from £599 per visit in 2016.

Overseas trips to the West Midlands region were 5.7% up on 2016 to reach just over 2.3 million overnight trips. The total number of nights was down by 10.9% to reach 14.2 million nights in 2017. Spend was down 5.6% to £807 million in 2017.

- Holiday visits are particularly likely to include going to a theatre with Stratford-upon-Avon a major draw
- The West Midlands is also one of the most popular areas for watching sport, the number of visitors coming primarily for this reason is behind only London and the North West
- Going to the pub and socialising with locals are popular, whilst eating out is less likely here than in many areas - probably a reflection of the high proportion of visits which involve staying as a guest with friends or relatives
- Those from the Irish Republic and France dominate overseas visits to the area, accounting for two in five holidaymakers (compared to around one in five nationally). Short travel times and event based visits may contribute to relatively few visits lasting over a week
- The West Midlands attracts holiday visits all year round, possibly boosted by non-seasonal activities such as shopping or going to the theatre. The area sees relatively high numbers of visits from those travelling with children but also from older visitors.

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 2017 was 31,766. 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 West Midlands was 1,916 interviews.

Tourism Day Visits

During 2017, GB residents took a total of 1,793 million Tourism Day Visits to destinations in England, Scotland or Wales, 2% down on 2016. Around £62.4 billion was spent during these trips, about 2.4% down on 2016.

The largest proportion of visits were taken to destinations in England (1,505 million visits or 84% of the total). The distribution of expenditure during visits broadly reflects this pattern, with a total value of day trips to England totalling £50.9 billion (81.5% of the total for GB).

Day trips to Warwickshire

There were 14.00 million day trips made to Warwickshire in 2017, up from 13.05 million in 2016. The value of these trips amounted to £402.9 million, up from £385 million in 2016.

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	232,000	58%	82,000	67%	314,000	60%
Self catering	7,000	2%	2,000	2%	9,000	2%
Camping	33,000	8%	2,000	2%	35,000	7%
Static caravans	12,000	3%	0	0%	12,000	2%
Group/campus	3,000	1%	1,000	1%	4,000	1%
Paying guest	0	0%	1,000	1%	1,000	0%
Second homes	9,000	2%	2,000	2%	11,000	2%
Boat moorings	17,000	4%	0	0%	17,000	3%
Other	11,000	3%	5,000	4%	16,000	3%
Friends & relatives	77,000	19%	27,000	22%	104,000	20%
Total 2017	401,000		122,000		523,000	
Comparison 2016	403,000		112,000		515,000	
Difference	-0.5%		8.9%		1.6%	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	416,000	49%	285,000	46%	701,000	47%
Self catering	11,000	1%	27,000	4%	38,000	3%
Camping	94,000	11%	26,000	4%	120,000	8%
Static caravans	25,000	3%	0	0%	25,000	2%
Group/campus	8,000	1%	29,000	5%	37,000	3%
Paying guest	0	0%	6,000	1%	6,000	0%
Second homes	26,000	3%	19,000	3%	45,000	3%
Boat moorings	71,000	8%	0	0%	71,000	5%
Other	29,000	3%	11,000	2%	40,000	3%
Friends & relatives	171,000	20%	221,000	35%	392,000	27%
Total 2017	852,000		625,000		1,477,000	
Comparison 2016	888,000		552,000		1,440,000	
Difference	-4.1%		13.2%		2.6%	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£51,347,000	73%	£29,700,000	67%	£81,047,000	71%
Self catering	£904,000	1%	£1,467,000	3%	£2,371,000	2%
Camping	£2,536,000	4%	£940,000	2%	£3,476,000	3%
Static caravans	£1,214,000	2%	£0	0%	£1,214,000	1%
Group/campus	£143,000	0%	£1,587,000	4%	£1,730,000	2%
Paying guest	£0	0%	£481,000	1%	£481,000	0%
Second homes	£973,000	1%	£1,123,000	3%	£2,096,000	2%
Boat moorings	£5,386,000	8%	£0	0%	£5,386,000	5%
Other	£2,170,000	3%	£369,000	1%	£2,539,000	2%
Friends & relatives	£5,725,000	8%	£8,445,000	19%	£14,170,000	12%
Total 2017	£70,397,000		£44,112,000		£114,509,000	
Comparison 2016	£66,738,000		£44,105,000		£110,843,000	
Difference	5.5%		0.0%		3.3%	

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	271,000	68%	87,000	71%	358,000	68%
Business	32,000	8%	6,000	5%	38,000	7%
Friends & relatives	94,000	23%	26,000	21%	120,000	23%
Other	5,000	1%	3,000	2%	8,000	2%
Study	0	0%	1,000	1%	1,000	0%
Total	401,000		122,000		523,000	
Comparison	2016	403,000	112,000		515,000	
Difference		-0.5%	8.9%		1.6%	

Nights by Purpose

	UK		Overseas		Total	
Holiday	597,000	70%	337,000	54%	934,000	63%
Business	70,000	8%	32,000	5%	102,000	7%
Friends & relatives	179,000	21%	233,000	37%	412,000	28%
Other	6,000	1%	8,000	1%	14,000	1%
Study	0	0%	16,000	3%	16,000	1%
Total	852,000		625,000		1,477,000	
Comparison	2016	888,000	552,000		1,440,000	
Difference		-4.1%	13.2%		2.6%	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£52,288,000	74%	£31,137,000	71%	£83,425,000	73%
Business	£9,098,000	13%	£2,324,000	5%	£11,422,000	10%
Friends & relatives	£8,683,000	12%	£7,817,000	18%	£16,500,000	14%
Other	£328,000	0%	£1,181,000	3%	£1,509,000	1%
Study	£0	0%	£1,654,000	4%	£1,654,000	1%
Total	£70,397,000		£44,112,000		£114,509,000	
Comparison	2016	£66,738,000	£44,105,000		£110,843,000	
Difference		5.5%	0.0%		3.3%	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

	Trips		Spend	
Urban visits	2,877,000		132,177,000	
Countryside visits	2,746,000		77,419,000	
Total	2017	5,623,000	209,596,000	
Comparison	2016	5,241,000	200,308,000	
Difference		7.3%	4.6%	

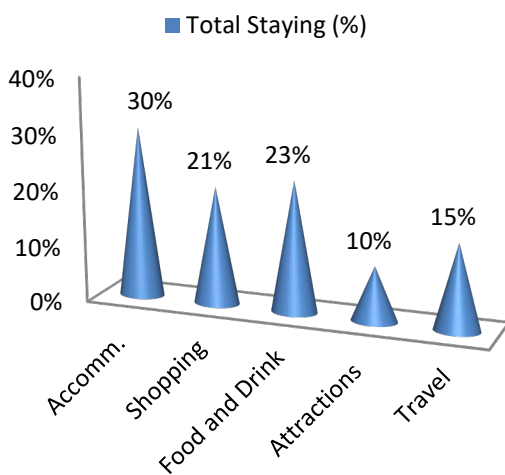
Value of Tourism

Expenditure Associated with Trips:

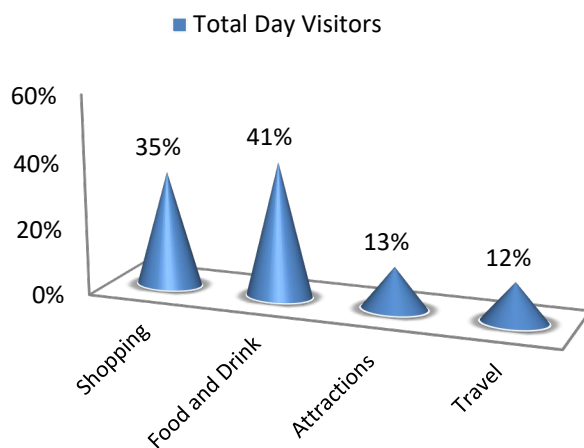
Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£21,252,000	£11,612,000	£16,947,000	£7,345,000	£13,241,000	£70,397,000
Overseas tourists		£13,649,000	£12,476,000	£9,878,000	£3,824,000	£4,285,000	£44,112,000
Total Staying		£34,901,000	£24,088,000	£26,825,000	£11,169,000	£17,526,000	£114,509,000
Total Staying (%)		30%	21%	23%	10%	15%	100%
Total Day Visitors		£0	£72,849,000	£85,055,000	£26,653,000	£25,038,000	£209,595,000
Total Day Visitors		0%	35%	41%	13%	12%	100%
Total	2017	£34,901,000	£96,937,000	£111,880,000	£37,822,000	£42,564,000	£324,104,000
%		11%	30%	35%	12%	13%	100%
Comparison	2016	£33,800,000	£93,118,000	£107,206,000	£36,277,000	£40,750,000	£311,151,000
Difference		3.3%	4.1%	4.4%	4.3%	4.5%	4.2%

Breakdown of expenditure



Breakdown of expenditure



Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£399,000	£357,000	£0	£19,169,000	£19,925,000

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 and personal visits.

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		£35,438,000	£1,701,000	£37,139,000
Retail		£23,847,000	£72,121,000	£95,968,000
Catering		£26,021,000	£82,503,000	£108,524,000
Attractions		£11,678,000	£28,232,000	£39,910,000
Transport		£10,515,000	£15,023,000	£25,538,000
Non-trip spend		£19,925,000	£0	£19,925,000
Total Direct	2017	£127,424,000	£199,580,000	£327,004,000
Comparison	2016	£123,525,000	£190,738,000	£314,263,000
Difference		3.2%	4.6%	4.1%

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		£25,770,000	£34,510,000	£60,280,000
Non trip spending		£3,985,000	£0	£3,985,000
Income induced		£13,773,000	£4,362,000	£18,135,000
Total	2017	£43,528,000	£38,872,000	£82,400,000
Comparison	2016	£42,181,000	£37,149,000	£79,330,000
Difference		3.2%	4.6%	3.9%

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		£127,424,000	£199,580,000	£327,004,000
Indirect		£43,528,000	£38,872,000	£82,400,000
Total Value	2017	£170,952,000	£238,452,000	£409,404,000
Comparison	2016	£165,706,000	£227,887,000	£393,593,000
Difference		3.2%	4.6%	4.0%

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 visitor spending.

Direct employment

Full time equivalent (FTE)						
	Staying Visitor		Day Visitor		Total	
Accommodation	626	35%	30	1%	656	16%
Retailing	173	10%	523	22%	696	17%
Catering	419	23%	1,330	55%	1,749	42%
Entertainment	173	10%	419	17%	592	14%
Transport	75	4%	108	4%	183	4%
Non-trip spend	332	18%	0	0%	332	8%
Total FTE	2017	1,800		2,410		4,209
Comparison	2016	1,744		2,303		4,047
Difference		3.2%		4.6%		4.0%
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	927	36%	44	1%	971	16%
Retailing	259	10%	785	22%	1,044	17%
Catering	629	25%	1,995	56%	2,624	43%
Entertainment	244	10%	591	17%	835	14%
Transport	106	4%	152	4%	258	4%
Non-trip spend	379	15%	0	0%	379	6%
Total Actual	2017	2,545		3,567		6,111
Comparison	2016	2,466		3,409		5,875
Difference		3.2%		4.6%		4.0%

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	496	575	1,071
Induced jobs	230	73	302
Total FTE	2017	725	1,373
Comparison	2016	703	1,322
Difference		3.2%	4.6%

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	565	656	1,221
Induced jobs	262	83	345
Total Actual	2017	827	1,566
Comparison	2016	801	1,507
Difference		3.2%	4.6%

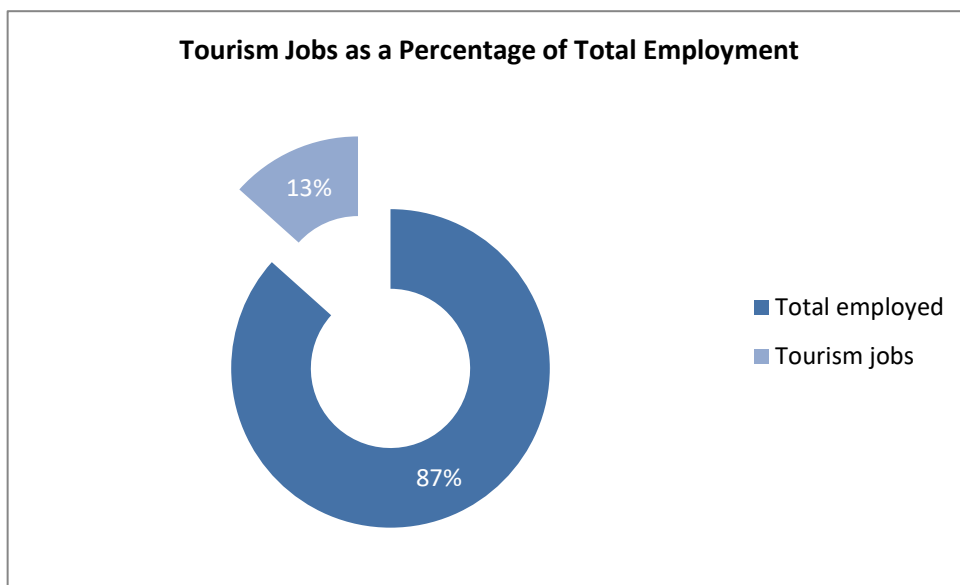
Total Jobs

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	1,800	71%	2,410	79%	4,209	75%
Indirect	496	20%	575	19%	1,071	19%
Induced	230	9%	73	2%	302	5%
Total FTE	2017	2,525	3,058		5,583	
Comparison	2016	2,447	2,922		5,369	
Difference		3.2%	4.6%		4.0%	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Direct	2,545	75%	3,567	83%	6,111	80%
Indirect	565	17%	656	15%	1,221	16%
Induced	262	8%	83	2%	345	4%
Total Actual	2017	3,372	4,305		7,677	
Comparison	2016	3,267	4,114		7,382	
Difference		3.2%	4.6%		4.0%	

Tourism Jobs as a Percentage of Total Employment

	Staying Visitor	Day visitors	Total
Total employed	57,400	57,400	57,400
Tourism jobs	3,372	4,305	7,677
Proportion all jobs	6%	8%	13%
Comparison	2016	4,114	7,382
Difference	3.2%	4.6%	4.0%



The key volume and value results included in this report are derived from the various sources as described throughout the report. These include regional and county breakdowns from national level data (Great Britain Tourism Survey and International Passenger Survey) as well as jobs and income information such as the Annual Survey of Hours & Earnings.

At a local level, the occupancy survey provides accurate local occupancy levels and known accommodation stock.

The key 2017 results of the Economic Impact Assessment are:

6.1 million trips were undertaken in the area
5.6 million day trips
0.5 million overnight visits

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

£324 million spent by tourists during their visit to the area
£27 million spent on average in the local economy each month.

£115 million generated by overnight visits
£210 million generated from irregular day trips.

£409 million spent in the local area as result of tourism, taking into account multiplier effects.

7,677 jobs supported, both for local residents from those living nearby.
6,111 tourism jobs directly supported
1,566 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 The Research Solution.

The model utilises information from national tourism surveys and regionally based data held by The Research Solution. 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 The Research Solution;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Registrar General's estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;

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.

Trips, Nights and Spend (Definitions)

'Trips' are classified as trips or journeys away from home involving an overnight stay, taken by adults aged 16 and over and accompanying children aged up to 15. Each adult or child present on the trip counts as a trip, for example, a family of 2 adults and 2 children taking a trip away would count as 4 trips.

'Nights' are the number of nights away taken by adults and accompanying children on these trips. Each night away spent by an adult or a child present on the trip counts as a night. Thus, a family of 2 adults and 2 children taking a 3 night trip away from home would count as 12 nights.

'Spend' is the expenditure relating to these trips. It includes costs paid in advance of the trip, costs paid during the trip itself and also any bills relating to the trip received after returning home. It covers costs paid by adults on the trip for themselves and on behalf of others on the trip, including children. It also includes costs paid on behalf of the person taking the trip, such as an employer paying the cost of a business trip.

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