

West Lindsey District Council STEAM Review 2019

West Lindsey's Visitor Economy

West Lindsey received **2.544 million visitors** during 2019. A total of **£142.53 million** was generated within the local economy through visitor and tourism business expenditure – an increase of **7%** from 2018. **2.3 million tourism visits** were made by **day visitors** generating **£89.48 million** for the local economy.

Visitors staying in the area as a part of a holiday or short break accounted for approximately **243 thousand visits** and **897 thousand nights** in local accommodation. In total **staying visitors** generate a total economic impact of **£53.06 million** for local businesses and communities with **£6.171 million** being spent on local accommodation, staying **3.7 nights** on average.

Visitors play a vital role in supporting **1,827 full time equivalent jobs** locally.

Visitor Numbers

In 2019, there were an estimated **2.544 million** tourism visits to the West Lindsey District Council area: **2.9%** higher than **2018** compared to the previous year, which shows an increase of **0.2%**.

Key Figures: Visitor Numbers

Visitor Numbers	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019 (Millions)	0.020	0.071	0.151	0.243	2.300	2.544
2018 (Millions)	0.016	0.066	0.149	0.233	2.239	2.472
Change 18/19 (%)	+24.7	+7.6	+0.9	+4.5	+2.7	+2.9
Share of Total (%)	1.0	3.0	6.0	10.0	90.0	100.0

Day visitors remain important to West Lindsey and of the **3.197 million visits**, **72%** of day visitors accounted for all visits to the area during 2019. Day visits increased by **2.7%** with the highest period of visits from May through to September.

The staying visitor continues to grow with an increase of **4.5%** for 2019; compared to 2018 when this figure only grew by **2.8%**. This could be due to the opening of new accommodation providers as well as increased marketing from Discover Gainsborough, Love Lincolnshire Wolds, Visit Lincoln and Visit Lincolnshire.

Staying visitors still only account for **28%** of all visitors and remains consistent from last year. All areas of the staying visitor has shown improvement, particularly in serviced

accommodation, which may be due to the opening of the Travelodge in Gainsborough in late 2018. These figures demonstrate that there is a need for highly quality accommodation in the district

Visitor Days

West Lindsey's **2.544 million visitors** during 2019 generated a total of **3.197 million** visitor days / nights in the District Council area – an increase of **3.5%** between 2018 and 2019.

Key Figures: Visitor Days

Visitor Days	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019 (Millions)	0.038	0.499	0.358	0.897	2.300	3.197
2018 (Millions)	0.030	0.464	0.355	0.849	2.239	3.089
Change 18/19 (%)	+27.9	+7.6	+0.9	+5.6	+2.7	+3.5
Share of Total (%)	1.0	16.0	11.0	28.0	72.0	100.0

Staying visitors accounted for **28%** of all visitor days and a total **897 thousand** days / nights spent in West Lindsey during 2019. There were an additional **48,000** staying visitor days in West Lindsey during the year – an increase of **5.6%**. Staying visitor days have grown annually since 2012, with an average year-on-year increase of **4.5%**.

Within the staying visitor market, visits staying in non-serviced accommodation made up the largest proportion with, **499,600** days / nights making up **16%** of the total. Staying with friends and relatives and serviced accommodation accounted for **11%** and **1%** respectively. The non-serviced accommodation sector continues to show a strong growth rate and will continue to increase especially with the number of new accommodation developments in the area. Serviced accommodation had the biggest increase of **27.9%**, which may have been down to the opening of the Travelodge in Gainsborough as mentioned previously. Staying with friends and relatives (SFR) continues to grow but only in small numbers.

Day visitor days increased by **2.7%** between 2018 and 2019, compared to a **-0.1%** decrease in the previous year. Staying visitors showed an increase of **5.6%**, which is another substantial increase, compared to 2018 (**3.4%**).

Length of stay for different visitor types: 2019

- Serviced Accommodation – 1.9
- Non-Serviced Accommodation – 7.0
- Staying with Friends / Relatives – 2.4
- Staying Visitors – 3.7
- Day Visitors - 1

- All Visitors – 1.3

Visitor Expenditure and total economic impact

Tourism visits were estimated to have generated **£142.53 million** for the local economy in 2019: a change of **+7%** compared to 2018. This figure comprises *direct expenditure* of visitors on goods and services (£106.04 million) and indirect / induced economic effects arising in the local economy (£36.49 million).

Distribution of Economic Effects

2019	Direct Visitor Expenditure						Indirect/ Induced	Total Economic Impact
	Accomm	Food & Drink	Recreation	Shopping	Transport	Total Direct (excl VAT)		
Totals	£6.171m	£24.99m	£10.04	£33.61m	£13.56m	£88.37m	£36.49m	£142.53m

Shopping and Food and Drink spend are particularly important, with these two categories accounting for **41.1%** of all direct visitor expenditure.

Key Figures: Economic Impact

Economic Impact	Serviced	Non-serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019 (Millions)	4.578	30.07	18.41	53.06	89.48	142.53
2018 (Millions)	3.626	26.89	17.79	48.30	84.95	133.26
Change 18/19 (%)	+26.2	+11.8	+3.5	+9.8	+5.3	+7
Share of Total (%)	3.0	21.0	13.0	37.0	63.0	100.0

In 2019, each visitor brought **£56.02** to the local economy – an extra **£2.12** than 2018. Staying visitors generate, on average, **£217.99** per visit and the longer stays in *non-serviced accommodation* generated almost double, at **£419.38**.

Average Economic Impact Generated by Each Type of Visitor: 2019

Economic Impact	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
Economic Impact per day	£116.96	£59.91	£50.72	£58.81	£38.90	£56.02
Economic Impact per visit	£222.23	£419.38	£121.75	£217.99	£38.90	£56.02

Employment Supported by Tourism

Tourism visits to West Lindsey in 2018 were estimated to have supported **1,827** Full-Time equivalent jobs (FTEs). **79.91%** of these are FTEs (1,460) and are assumed to have been generated directly through expenditure of visitors (Direct Employment). The remaining

20.09% are indirect and induced (367), which means that they are supported through the supply chain and further rounds of expenditure within the economy including employee spend.

Key figures: Employment Supported

Employment Supported	Direct Employment						Indirect / induced	Total
	Serviced	Non-serviced	SFR	Staying Visitors	Day Visitors	Total Direct		
2019 (FTEs)	203	323	161	687	774	1460	367	1827
2018 (FTEs)	198	306	162	666	762	1428	356	1784
Change 18/19 (%)	+2.3	+5.4	-0.3	+3.1	+1.5	+2.2	+3.0	+2.4
Share of total (%)	14.0	22.0	11.0	47.0	53.0	79.91	20.09	100.0

Distribution of Key Impacts by Quarter

Visitor Numbers

January to March	April to June	July to September	October to December
21.6%	28.0%	35.9%	14.5%

Visitor Days

January to March	April to June	July to September	October to December
20.0%	28.8%	36.7%	14.6%

Economic Impact

January to March	April to June	July to September	October to December
19.4%	28.6%	37.2%	14.8%

STEAM FINAL TREND REPORT FOR 2009-2019

WEST LINDSEY

Comparing 2019 and 2018

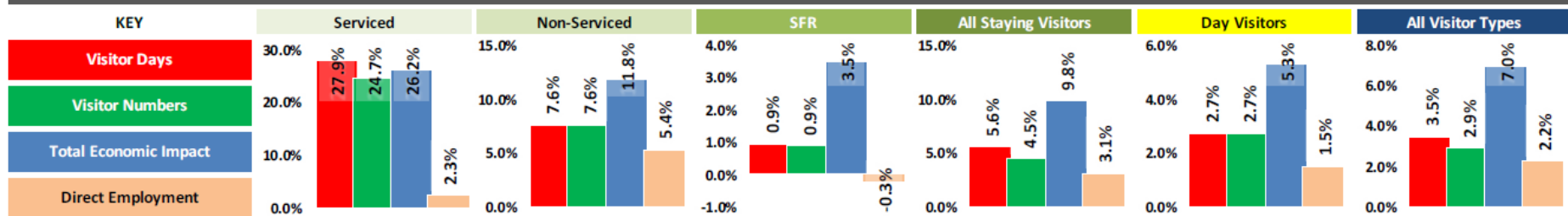
All £'s Historic Prices

COMPARATIVE HEADLINES

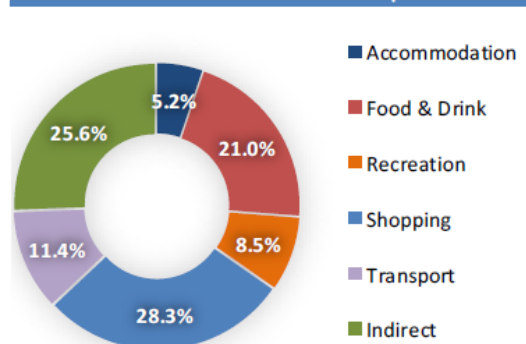
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2019 & 2018 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %			
An increase of 3% or more																					
Less than 3% change																					
A Fall of 3% or more																					
Visitor Days	M	0.039	0.030	27.9%	0.500	0.464	7.6%	0.359	0.355	0.9%	0.897	0.850	5.6%	2.300	2.239	2.7%	3.197	3.089	3.5%		
Visitor Numbers	M	0.021	0.016	24.7%	0.072	0.067	7.6%	0.151	0.150	0.9%	0.243	0.233	4.5%	2.300	2.239	2.7%	2.544	2.472	2.9%		
Direct Expenditure	£M																106.04	99.14	7.0%		
Economic Impact	£M	4.578	3.626	26.2%	30.07	26.89	11.8%	18.41	17.79	3.5%	53.06	48.30	9.8%	89.48	84.95	5.3%	142.53	133.26	7.0%		
Direct Employment	FTEs	203	198	2.3%	323	306	5.4%	161	162	-0.3%	687	666	3.1%	774	762	1.5%	1,460	1,428	2.2%		
Total Employment	FTEs																1,827	1,784	2.4%		

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2019 & 2018 - IN HISTORIC PRICES



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



Sectors	2019	2018	+/- %
Accommodation	7.405	6.307	17.4%
Food & Drink	29.98	28.17	6.4%
Recreation	12.05	11.30	6.7%
Shopping	40.33	38.06	6.0%
Transport	16.27	15.31	6.3%
TOTAL DIRECT	106.04	99.14	7.0%
Indirect	36.49	34.11	7.0%
TOTAL	142.53	133.26	7.0%

Sectoral Distribution of Employment - FTEs

