

## West Lindsey District Council STEAM Review 2020

### West Lindsey's Visitor Economy

West Lindsey received **1.277 million visitors** during 2020. A total of **£74.61 million** was generated within the local economy through visitor and tourism business expenditure – a significant decrease of **47.6%** from 2019, which is a result of the Coronavirus pandemic.

**1.146 million tourism visits** were made by **day visitors** generating **£45.8 million** for the local economy.

Visitors staying in the area as a part of a holiday or short break accounted for approximately **130,700 visits** and **479,900 nights** in local accommodation. In total **staying visitors** generate a total economic impact of **£28.82 million** for local businesses and communities with **£3.525 million** being spent on local accommodation, staying **3.6 nights** on average.

Visitors play a vital role in supporting **986 full time equivalent jobs** locally.

### Visitor Numbers

In 2020, there were an estimated **1.277 million** tourism visits to the West Lindsey District Council area: **49.8** less than **2019** compared to the previous year, which shows an increase of **2.9%**. This is mainly due to the Coronavirus pandemic which resulted in a number of nationwide lockdowns meaning businesses were unable to open to the public.

#### Key Figures: Visitor Numbers

Visitor Numbers	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2020 (Millions)	0.008	0.038	0.083	1.130	1.146	1.277
2019 (Millions)	0.020	0.071	0.151	0.243	2.300	2.544
Change 19/20 (%)	-58.6%	-45.8%	-44.8%	-46.3%	-50.2%	-49.8%
Share of Total (%)	1%	3%	6%	10%	90%	100%

Day visitors remain important to West Lindsey and of the **1.626 million visits**, **70%** of day visitors accounted for all visits to the area during 2020. Day visits dramatically decreased by **-50.2%** which is a result of the Coronavirus pandemic. The highest period of visits were from July through to September.

Overnight stays took a considerable hit in 2020 which the staying visitors shrinking by **-46.5%** during 2020; compared to 2019 when this figure grew by **5.5%**. Local lockdowns and travel restrictions have all made an impact on accommodation providers, especially self-catering and B&B as not all were able to support emergency services with accommodation during lockdown.

Staying visitors still only account for **30%** of all visitors but has increased by **2%** from last year. All areas of the staying visitor have stayed consistent in terms of share of the total visitors. This may be due to peaks in travel at times when restrictions were lifted and overnight stays were permitted. There was also an increased in 'staycations' which may have contributed to this figure.

### Visitor Days

West Lindsey's **1.277 million visitors** during 2020 generated a total of **1.626 million** visitor days / nights in the District Council area – a decrease of **-49.1%** between 2019 and 2020.

#### Key Figures: Visitor Days

Visitor Days	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2020 (Millions)	0.016	0.265	0.198	0.479	1.146	1.626
2019 (Millions)	0.038	0.499	0.358	0.897	2.300	3.197
Change 19/20 (%)	-58.7	-46.8	-44.7	-46.5	-50.2	-49.1
Share of Total (%)	1.0	16.0	12.0	30.0	70.0	100.0

Staying visitors accounted for **30%** of all visitor days and a total of **479,900 thousand** days / nights spent in West Lindsey during 2020. This almost half from last year which was **896,000 (-46.5)**. Staying visitor days have grown annually since 2012, therefore we anticipate this number to grow again once a 'new normal' is established.

Within the staying visitor market, visits staying in non-serviced accommodation made up the largest proportion with, **265,500** days / nights making up **16%** of the total. Staying with friends and relatives and serviced accommodation accounted for **12%** and **1%** respectively.

Coming out of the pandemic, the non-serviced accommodation sector will continue to grow with the rise of the 'staycation' and more holidaymakers being more cautious about where they travel. There has also been an increase in holiday let developments which will start to become available in 2021/22, providing more options for potential visitors.

Day visitor days decreased by **-50.2%** between 2019 and 2020, compared to a **2.7%** increase in the previous year. Similarly, staying visitors showed a decrease of **-45.5%**. The last recorded decrease was in 2012 which was considerably smaller at **-7.9%**.

### Length of stay for different visitor types: 2020

(Number of days divided by number of visitors)

- Serviced Accommodation – 1.9
- Non-Serviced Accommodation – 6.8
- 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 **£74.61 million** for the local economy in 2020: a change of **-47.6%** compared to 2019. This figure comprises *direct expenditure* of visitors on goods and services (£55.50 million) and indirect / induced economic effects arising in the local economy (£19.11 million). August also has the highest spend of £16.45 million and saw an increase of **116%** from the previous month. This kind of spend would typically be related to the summer holidays. However the ‘eat out to help out scheme’ also ran last year which was aimed at encouraging people to support hospitality venues. The increase from July to August during 2019 was only **50.98%** which shows just how successful the scheme was.

### Distribution of Economic Effects

2020	Direct Visitor Expenditure						Indirect/ Induced	Total Economic Impact
	Accomm	Food & Drink	Recreation	Shopping	Transport	Total Direct (excl VAT)		
<b>Totals</b>	£3.525m	£13.9m	£5.569	£17.55m	£7.132m	£47.68m	£19.11m	£74.61m

Shopping and Food and Drink spend remain particularly important, with these two categories accounting for **42.1%** of all direct visitor expenditure.

### Key Figures: Economic Impact

Economic Impact	Serviced	Non-serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2020 (Millions)	1.939	16.42	10.46	28.82	45.80	74.61
2019 (Millions)	4.578	30.07	18.41	53.06	89.48	142.53
Change 18/19 (%)	-57.6	-45.3	-43.2	-45.6	-48.8	-47.6
Share of Total (%)	3.0	22.0	14.0	39.0	61.0	100.0

In 2020, each visitor brought **£58.43** to the local economy – an extra **£2.41** than 2019. This interesting as despite visitors being considerably lower, they are spending more. Staying visitors generate, on average, **£220.50** per visit and the longer stays in *non-serviced accommodation* generated more than double, at **£432.10**.

*Average Economic Impact Generated by Each Type of Visitor: 2020*

Economic Impact	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
Economic Impact per day	£120.05	£63.54	£52.25	£59.59	£39.96	£58.43
Economic Impact per visit	£228.11	£432.10	£125.42	£222.50	£39.96	£58.43

**Employment Supported by Tourism**

Tourism visits to West Lindsey in 2020 were estimated to have supported **986** Full-Time equivalent jobs (FTEs), a decrease of **46%**. This will have been a result of the pandemic and the closure of hospitality venues. Numbers started at just over **1300** in January but then start to decrease, with a sudden drop in April to **157** which was when the first lockdown came in to effect. Numbers gradually increase again around July, hitting the highest point in August at **2,374** which would be to accommodate the easing of restrictions and the ‘eat out to help out’ scheme. Numbers then start to decrease again towards the end of the year when the second lockdown was introduced.

Of the current figures, **80.5%** of employment are FTEs (794) and are assumed to have been generated directly through expenditure of visitors (Direct Employment). The remaining **19.5%** are indirect and induced (192), 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		
2020 (FTEs)	103	204	92	399	395	794	192	986
2019 (FTEs)	203	323	161	687	774	1460	367	1827
Change 18/19 (%)	-49.0	-36.6	-43.2	-41.8	-49.0	-45.6	-47.6	-46.0
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
32.3%	6.4%	43.2%	17.1%

### *Visitor Days*

January to March	April to June	July to September	October to December
30.8%	5.6%	46.8%	16.8%

### *Economic Impact*

January to March	April to June	July to September	October to December
30.0%	5.2%	48.0%	16.7%

STEAM FINAL TREND REPORT FOR 2009-2020

WEST LINDSEY DISTRICT COUNCIL

Comparing 2020 and 2019

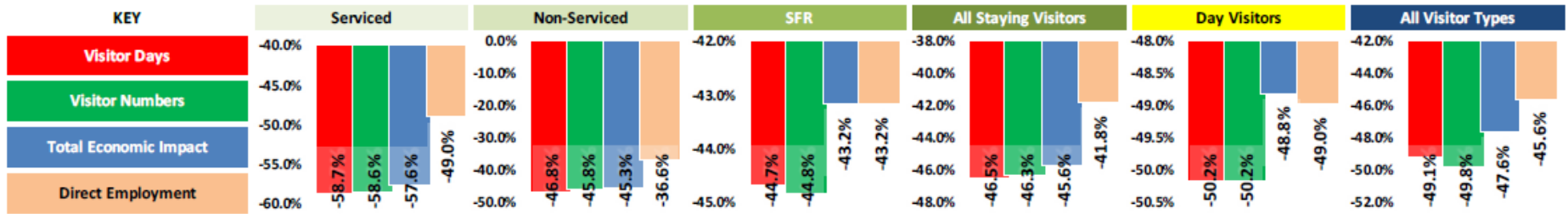
All £'s Historic Prices

COMPARATIVE HEADLINES

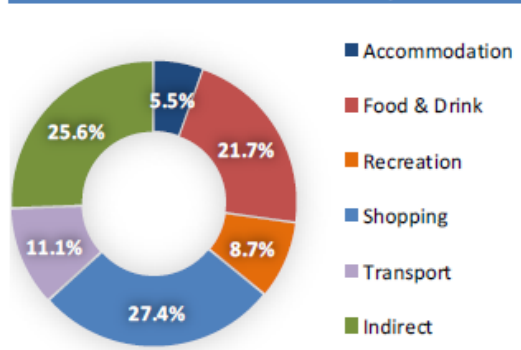
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2020 & 2019 - IN HISTORIC PRICES

KEY	KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2020 & 2019 - IN HISTORIC PRICES																	
	Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced														
	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %
<b>Visitor Days</b> M	0.016	0.039	-58.7%	0.266	0.499	-46.8%	0.198	0.358	-44.7%	0.480	0.896	-46.5%	1.146	2.300	-50.2%	1.626	3.197	-49.1%
<b>Visitor Numbers</b> M	0.009	0.021	-58.6%	0.039	0.072	-45.8%	0.083	0.151	-44.8%	0.131	0.243	-46.3%	1.146	2.300	-50.2%	1.277	2.544	-49.8%
<b>Direct Expenditure</b> £M																55.50	106.01	-47.6%
<b>Economic Impact</b> £M	1.939	4.574	-57.6%	16.42	30.04	-45.3%	10.46	18.41	-43.2%	28.82	53.02	-45.6%	45.80	89.48	-48.8%	74.61	142.50	-47.6%
<b>Direct Employment</b> FTEs	103	202	-49.0%	204	322	-36.6%	92	161	-43.2%	399	686	-41.8%	395	774	-49.0%	794	1,460	-45.6%
<b>Total Employment</b> FTEs																986	1,827	-46.0%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2020 & 2019 - IN HISTORIC PRICES



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



Sectors	2020	2019	+/- %
Accommodation	4.104	7.398	-44.5%
Food & Drink	16.19	29.98	-46.0%
Recreation	6.483	12.05	-46.2%
Shopping	20.43	40.32	-49.3%
Transport	8.302	16.27	-49.0%
<b>TOTAL DIRECT</b>	<b>55.50</b>	<b>106.01</b>	<b>-47.6%</b>
Indirect	19.11	36.49	-47.6%
<b>TOTAL</b>	<b>74.61</b>	<b>142.50</b>	<b>-47.6%</b>

Sectoral Distribution of Employment - FTEs

Sectors	2020	2019	+/- %
Accommodation	192	311	-38.2%
Food & Drink	210	389	-46.0%
Recreation	102	190	-46.2%
Shopping	242	477	-49.3%
Transport	48	94	-48.9%
<b>TOTAL DIRECT</b>	<b>794</b>	<b>1,460</b>	<b>-45.6%</b>
Indirect	192	367	-47.6%
<b>TOTAL</b>	<b>986</b>	<b>1,827</b>	<b>-46.0%</b>

