



Lincolnshire's Visitor Economy

This is a summary of the annual tourism economic impact research undertaken for Lincolnshire County Council by Global Tourism Solutions (UK) Ltd.

The county received
18.58 million
Tourism Visits during 2014

Visitors **staying across Lincolnshire** as part of a holiday or short break, accounted for **3.3 million visits** and **12.8 million nights** in local accommodation

28 million Visitor Days and Nights generated by visitors to Lincolnshire in 2014

A total of **£1.266 billion** was generated within the local economy through visitor and tourism business expenditure

15.28 million tourism visits made by Day Visitors



Visitor Numbers **+0.8%** between 2013 and 2014



Day Visits generated **£531 million** for the local economy in 2014

Visitors to the county play a vital role in supporting nearly **19 thousand full time equivalent jobs**



In total, **staying visitors** generate a **total economic impact of £736 million** for the businesses and communities of Lincolnshire



Visitors **staying in Lincolnshire** spend a total of **£146 million** on local accommodation, staying 3.9 nights on average



Economic Impact +5.9% between 2013 and 2014

Total Visitor Days and Nights +2.2% between 2013 and 2014, accounting for an **additional 616,000 days and nights**

2014

Total
Visitor
Numbers
18.58m

% Change
2013>2014
+0.8%

Net Change
2013>2014
**+153,000
Visits**

Visitor Types

Staying Visitors encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

Day Visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

Visitor Numbers

In 2014, there were an estimated 18.58m tourism visits to Lincolnshire, 0.8% higher than in 2013.

Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2014 (Millions)	M	0.905	1.296	1.107	3.308	15.276	18.584
2013 (Millions)	M	0.905	1.283	1.100	3.288	15.143	18.431
Change 13/14 (%)	%	+0.0	+1.0	+0.7	+0.6	+0.9	+0.8
Share of Total (%)	%	4.9	7.0	6.0	17.8	82.2	100.0

Day visitors to Lincolnshire accounted for 82.2% of all visits, totalling 15.276m. Day visits increased by 0.9% from 2013 levels, with a mix of very positive performance in the run up to and including Easter (+14.7% March and April, combined), followed by a fall of -0.8% between May and August.

The staying visitor market saw a marginally lower level of growth with +0.6% change in visits compared to 2013. The largest group of visits in the staying visitor market used *non-serviced accommodation*, covering the wide range of accommodation including camping and caravanning, self-catering holiday homes and hostel style accommodation. The 1.3m visits using non-serviced accommodation accounted for 7% of all visits to the county, and showed a growth of 1% between 2013 and 2014. *Stays with friends and relatives*, with a total of 1.1m during 2014 were the second largest staying visitor group at 6% of all visits, up 0.7% on 2013. The *serviced accommodation* sector generated 0.9m visits during 2014, accounting for 4.9% of the total number of visits to the county and remaining largely static compared to 2013.

Total Visitor Days
28.07m

% Change 2013>2014
+2.2%

Net Change 2013>2014
+616k Visitor Days

Visitor Days

Lincolnshire’s 18.58m tourism visits during 2014 generated a total of 28.1m visitor days / nights spent within the county, an increase of +2.2% between 2013 and 2014. Visitor days to Lincolnshire grew at a faster rate than the number of visits to the county, which, encouragingly, indicates an increase in the visitors’ average length of stay, which was up 3.3% among staying visitors.

Key Figures: Visitor Days

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2014 (Millions)	M	1.684	8.480	2.627	12.791	15.276	28.067
2013 (Millions)	M	1.624	8.075	2.609	12.309	15.143	27.452
Change 13/14 (%)	%	+3.7	+5.0	+0.7	+3.9	+0.9	+2.2
Share of Total (%)	%	6.0	30.2	9.4	45.6	54.4	100.0

Staying visitors accounted for 45.6% of all visitor days and a total of 2.6 million days / nights spent in the county during 2014. There were nearly half a million additional staying visitor days spent in the county during 2014, an increase of 3.9%. Within the staying visitor market, visits using paid accommodation (of which there are nearly 1,500 establishments countywide) accounted for the largest portion, with nearly 8.5 million days / nights spent in non-serviced accommodation (up 5%) and 1.7 million days spent in serviced accommodation (up 3.7%).

Day visitor days increased by 0.9% between 2013 and 2014. Day visits have been growing by an average of 1.5% a year since 2009, a growth of more than 1 million day visitor days during the period 2009 to 2014.

Overall, visitor days have been growing by an average of 1.4% between 2009 and 2014 and the total number of visitor days has grown by more than 1.8 million from 26.2 million in 2009 to 28.1 million in 2014.

Average Length of Stay for Different Visitor Types – 2014



Visitor Expenditure and Total Economic Impact

Tourism visits were estimated to have generated £1.266 billion for the local economy in 2014, a change of +5.9% compared to 2013. This figure comprises *direct expenditure* of visitors on goods and services (£945 million) and the subsequent indirect / induced economic effects arising within the local economy (£321 million).

Distribution of Economic Effects

2014	Direct Visitor Expenditure						Indirect and Induced	Total Economic Impact
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	£146m	£258m	£101m	£312m	£127m	£945m	£321m	£1.266bn

Note: m = million, bn = billion

Key Figures: Economic Impact

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2014 (£ Billions)	£Bn	0.182	0.434	0.120	0.736	0.53	1.266
2013 (£ Billions)	£Bn	0.171	0.397	0.116	0.684	0.512	1.196
Change 13/14 (%)	%	+6.6	+9.1	+3.5	+7.5	+3.7	+5.9
Share of Total (%)	%	14.3	34.2	9.5	58.1	41.9	100.0

The largest growth in economic impact has arisen from the growth in staying visits, accounting for £52m of the £70m growth between 2013 and 2014. The staying visitor market accounted for 58.1% of the total economic impact of £1.515 billion. Day visitors contributed a further growth of £19 million in economic benefit for the county.

The *non-serviced accommodation* sector accounted for the largest share of the overall growth in economic impact at £36 million (52%).

Average Economic Impact Generated by Each Type of Visitor – 2014

Economic Impact	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£ 107.88	£ 51.14	£ 45.85	£ 57.52	£ 34.73	£ 45.12
Economic Impact per Visit	£ 200.84	£ 334.65	£ 108.75	£ 222.43	£ 34.73	£ 68.14

Total
Economic
Impact
£1.266bn

% Change
2013>2014
+5.9%

Net Change
2013>2014
+£70m

**Total
Employment
Supported**
**18,907
FTEs**

**% Change
2013>2014**
+1.2%

**Net Change
2013>2014**
**+219
FTEs**

Employment Supported by Tourism

Tourism visits to Lincolnshire in 2014 were estimated to have supported 18,907 Full-Time Equivalents (FTEs). 80.6% of these FTEs (15,251) are assumed to have been generated directly, through the expenditure of visitors (Direct Employment), with the remaining 19.3% being indirect and induced (3,656), that is supported through the supply chain and further rounds of expenditure within the economy including employee spend.

Distribution of Employment

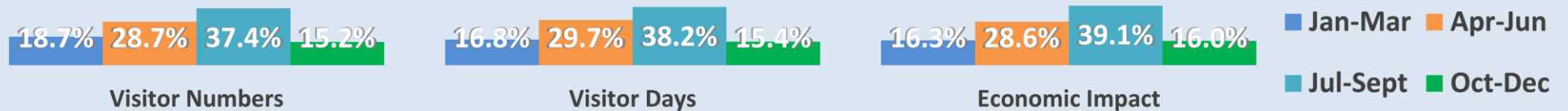
2014	Direct Employment						Indirect and Induced	Total Employment
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	4,635	3,790	1,807	4,183	835	15,251	3,656	18,907

Key Figures: Employment Supported

Employment Supported		Direct Employment					Total Direct	Indirect and Induced	Total
		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors			
2014 (FTEs)	FTE	4,502	4,357	1,196	10,055	5,196	15,251	3,656	18,907
2013 (FTEs)	FTE	4,471	4,195	1,204	9,870	5,219	15,089	3,599	18,688
Change 13/14 (%)	%	+0.7	+3.9	-0.6	+1.9	-0.4	+1.1	+1.6	+1.2
Share of Total (%)	%	23.8	23.0	6.3	53.2	27.5	80.7	19.3	100.0

The largest portion of the direct employment supported is associated with the *serviced accommodation* sector, accounting for 4,502 FTEs, up +0.7% compared to 2013. Overall growth in employment associated with staying visits higher at +1.9%, with the largest growth of these FTEs being associated with the *non-serviced accommodation* sector, up 3.9%.

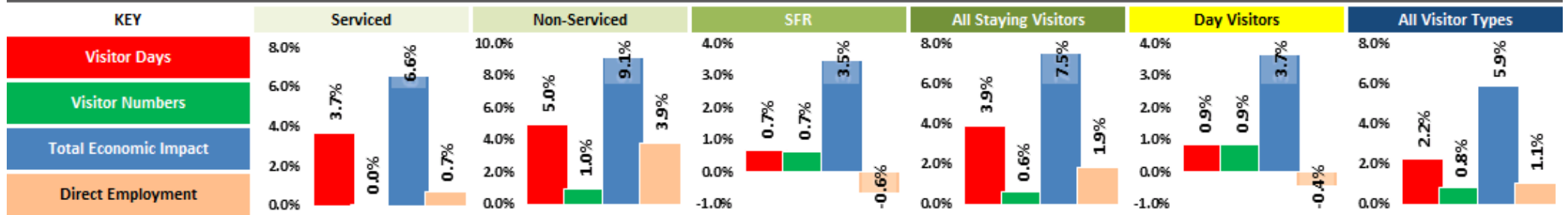
Distribution of Key Impacts by Quarter – 2014



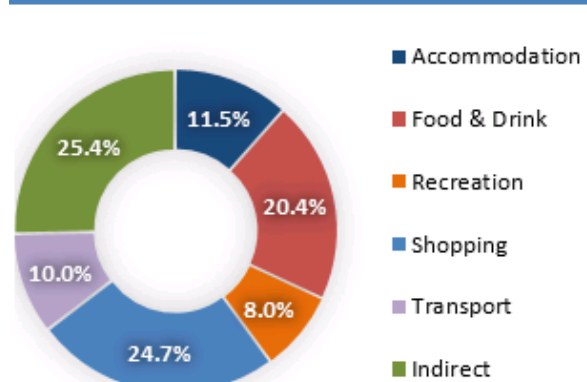
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2014 & 2013 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2014	2013	+/- %	2014	2013	+/- %	2014	2013	+/- %	2014	2013	+/- %	2014	2013	+/- %	2014	2013	+/- %			
Visitor Days	M	1,684	1,624	3.7%	8,480	8,075	5.0%	2,627	2,609	0.7%	12,79	12,31	3.9%	15,28	15,14	0.9%	28,07	27,45	2.2%		
Visitor Numbers	M	0,905	0,905	0.0%	1,296	1,283	1.0%	1,107	1,100	0.7%	3,308	3,288	0.6%	15,28	15,14	0.9%	18,58	18,43	0.8%		
Direct Expenditure	£Bn																0,945	0,892	5.9%		
Economic Impact	£Bn	0,182	0,171	6.6%	0,434	0,397	9.1%	0,120	0,116	3.5%	0,736	0,684	7.5%	0,531	0,512	3.7%	1,266	1,196	5.9%		
Direct Employment	FTEs	4,502	4,471	0.7%	4,357	4,195	3.9%	1,196	1,204	-0.6%	10,055	9,870	1.9%	5,196	5,219	-0.4%	15,251	15,089	1.1%		
Total Employment	FTEs																18,907	18,688	1.2%		

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2014 & 2013 - IN HISTORIC PRICES



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



Sectors	2014	2013	+/- %
Accommodation	0.146	0.133	10.1%
Food & Drink	0.258	0.245	5.3%
Recreation	0.101	0.096	5.2%
Shopping	0.312	0.297	5.1%
Transport	0.127	0.121	5.1%
TOTAL DIRECT	0.945	0.892	5.9%
Indirect	0.321	0.304	5.8%
TOTAL	1.266	1.196	5.9%

Sectoral Distribution of Employment - FTEs

