



**Open Report on behalf of Andy Gutherson, Executive Director - Place**

Report to:	<b>Environment and Economy Scrutiny Committee</b>
Date:	<b>27 February 2024</b>
Subject:	<b>Visitor Economy Update</b>

**Summary:**

It has been a difficult year for Visitor Economy businesses with bad weather, challenging economic climate, staff shortages and reduced opening hours. The Council has continued to take strategic leadership and support this priority sector, through providing direct support to raise the profile of the sector via [www.visitlincolnshire.com](http://www.visitlincolnshire.com) and support the continued development through specialist support, development programmes and tools and enhance the visitor experience.

Fundamentally our strategic objective has always been to increase the number of higher spending staying visitors to the county.

**Actions Required:**

Members of the Environment and Economy Scrutiny Committee are invited to:

- 1) Note the achievements of the revitalised [www.visitlincolnshire.com](http://www.visitlincolnshire.com) website.
- 2) To consider the proposed objectives for the Strategic Plan for the Visitor Economy in Lincolnshire.
- 3) To endorse our support for the Local Visitor Economy Partnership (LVEP) and our role within it.
- 4) To advise on how we can encourage more of the local population to engage with the website.

## 1. Background

In the County Council's Corporate Plan, it says that we will 'champion Lincolnshire as a destination of choice'. This report provides a progress report on how we deliver on the ambition that 'more people visit and enjoy Lincolnshire's leisure, tourism and cultural experiences'.

Lincolnshire County Council (LCC) has been active in tourism since the early 1990s. *Our strategic objective has always been to increase the number of higher spending staying visitors to the county, and that remains the case today.*

LCC undertakes a strategic place leadership role, we inspire through our award-winning attractions, we provide a platform to support all visitor economy businesses (website entries and social media, business support, development programmes), we actively undertake an attract and dispersal strategy to enhance the visitor experience, this includes local, national and international visitors.

We have had periods where we invested heavily in promotion of city coast and countryside, in product development, and now after the Covid lockdowns our investment is in supporting businesses through up-skilling, and in high level promotion. Fundamentally that business support and promotion retain that strategic objective, of increasing the number of higher spend visitors to the county.

This Visitor Economy Team continues to focus on actions ‘to achieve an ambitious and sustainable tourism sector in Greater Lincolnshire which grows, increases in value, and provides jobs, investment and a quality product offer’.

### **Visitor Economy Data**

There are a variety of ways to establish the state of business in the Visitor Economy and there is no doubt that 2023 has been a difficult year for Lincolnshire businesses. The annual STEAM data is comprehensive but lags 4-5 months behind and the 2023 figures won't be available until the Spring of 2024. The figures for [www.visitlincolnshire.com](http://www.visitlincolnshire.com) which LCC own and run, are a good indicator of interest in the county and of course, feedback from the businesses themselves.

### **STEAM (Scarborough tourism economic impact assessment modelling tool) 2022 Key Findings for Lincolnshire** ( there is a time lag due to data capture and analysis) :

**Employment supported by the sector is about in line with 2016** – following the visitor numbers trend. 28,215 people are supported by the visitor economy sector and adjacent sectors.

**Economic impact has increased by £0.59 billion (28.9%) to £2.62 billion in 2022.** This puts the trend back on track, following two “lost” years in 2020 and 2021. Economic impact is about £150 million higher than 2019 levels.

It is estimated **visitor numbers remain lower than pre-covid levels.** This indicates that the recovery is not complete. In total there were 30.82 million visits made to Greater Lincolnshire in 2022, 16.8% above 2021 but 7.8% lower than 2016 levels; and every subsequent year pre-covid.

**Staying visitors account for 55% of the economic impact, but 15% of the total visitor numbers.**

- a. There were 4.76 million staying visitors, worth £1.45 billion in 2022. There were 2% more staying visitors than 2019 pre-covid; and 29% more than 2021. An average staying visitor spends **£305** in Greater Lincolnshire.
- b. 26 million people visited tourist sites in Greater Lincolnshire during 2022, worth £1.17 million to the economy. Day visitor numbers were well below 2016-2019 levels. An average day visitor spends **£45** during a visit to Greater Lincolnshire.
- c. 60% of direct employment in the visitor economy is supported by staying visitors.

**The trend from serviced to non-serviced accommodation continues.** 1.16 million visitors stayed in serviced accommodation (hotels, B&B) during 2022, below 2018 and 2019 levels. Whereas 1.86 million visitors stayed in non-serviced accommodation (self-catering, Air BnB). In terms of impact, serviced accommodation was worth £325 million, employing 4,950 people. Non-serviced accommodation was worth £866 million, employing 6,360 people.

#### **Analytics for [www.visitlincolnshire.com](http://www.visitlincolnshire.com)**

The website was rebuilt during the covid lockdown, it was one of the main actions coming out of the Tourism Commission, (public and private sector Visitor Economy Task Force) there was a clear need for increased profile and marketing support for visitor economy businesses who were suffering greatly.

A strategy for [www.visitlincolnshire.com](http://www.visitlincolnshire.com) has been produced. Our vision is that the site is **“A beautifully curated, expertly delivered, online platform that adds value to all Lincolnshire businesses by inspiring and attracting consumers to our product offer; and converting them to purchase/consume; and extend their stay”**.

[www.visitlincolnshire.com](http://www.visitlincolnshire.com) (VLS) has seen excellent growth in 2023. The website has achieved an increase in user traffic up 61% in 2023 compared to 2022. Search engine optimisation is excellent, and it appears first or second in most searches.

The website saw 1,257,024 page views Jan-Dec 2023. Page views peaked in August with 167,216 during the height of the summer period, coinciding with the school summer holidays.

Stamford has ranked at number 1 in search for an extended period of time now. The Stamford Destination page directs a significant amount of constant traffic to the website (average 49,500 a month).

Growth is attributed to the optimised and continuously updated events pages and also the new valuable destination and category level content added in recent months.

The site is performing for the Visitor Economy businesses as intended; for example, the average conversion rate of visitors clicking through to a booking link or for more information is around 19.3% across the site for the period June to December 2023, this has consistently been around 13-15% since 2021, we understand the industry standard is around 5%. The rise in this figure is pleasing and shows that [www.visitlincolnshire.com](http://www.visitlincolnshire.com) is delivering business

and providing the potential visitor with what they want; as well as delivering valuable traffic to businesses booking pages.

95% of all traffic is from across the UK, with 4% from the Lincoln area and 35% from the London area. Top four overseas countries are USA, Australia, Netherlands and France. The website is as useful to local residents as it is to visitors. We need to ensure that more locals are aware of the website for their own days out, places to eat, walks and events.

We were one of four areas in the UK that took part in the Year of the Coast Spring campaign. It achieved 8.2 million impressions of which 4.5 million were for Lincolnshire. We had a higher-than-average campaign click-through rate of 3.35% (2.75 campaign average). Sutton on Sea and our nature content were the best performing posts.

### **Business Feedback**

The bad weather really affected the 2023 season, especially where day-trippers are concerned, and it was very quiet until well into August. In general people came but spend was down and the footfall did not convert into sales. The cost of doing business was an issue, when the businesses were taking money, they were not making much money.

Businesses report no pattern to trade and there were a lot of last-minute bookings and cutting of rates at the 11<sup>th</sup> hour on the whole pubs/restaurants did better than retail and there have been closures across the board and we have seen some quality businesses go. There have been a number of B&B's that have closed but there has been growth in the number of self-catering businesses. LCC Countryside team have reported a quieter year with car parks less busy.

The wedding market is important for many of our hotels and bigger venues. People are scaling down and no-frills wedding packages are the trend, with smaller weddings, more 'DIY' with the hospitality business often just providing the venue. There may be both an economic and a covid influence here when people enjoyed their smaller weddings more.

The situation in Lincolnshire is probably no different to the rest of England. National Coastal Tourism Academy members from around England reported in June that all resorts were much quieter than usual; and throughout the year have reflected on the last-minute nature of bookings. They also reported that even when people came, they were not spending.

It is fair to say that many people have spent the savings that they built up during lockdown. There is nervousness around what 2024 will bring, the economy is likely to be still very challenging and people will remain very careful with their money.

### **Improvements to [www.visitlincolnshire.com](http://www.visitlincolnshire.com)**

It is important to constantly upgrade our content on the site, this helps us to keep visitors on the site and maintain our top position in search engine optimisation. This is continual and the team have plans for the areas where we can do still better in 2024.

Growth is attributed to the optimised and continuously updated Events pages and the constant addition of new content. **Walking** is one of the most popular areas of the site. The

team have worked with the Countryside Team to improve the presentation and searchability of walks and we now feature over 200 LCC, Poacher Line and Area of Outstanding Natural Beauty (AONB) walks, and the profile of the Viking Way has also been raised; walking is one of the most popular areas of the website.

We will continue to raise the profile of the Viking Way in time for its relaunch in early 2024 and during the year work on a new area for the King Charles III England Coast Path (KCIIECP). Viking Way and KCIIECP are our two major walks and will be presented accordingly. [www.visitlincolnshire.com](http://www.visitlincolnshire.com) has a large and growing audience of both residents and visitors to the county, working with other areas of LCC is a win win and has potential for further development. We have also refreshed the existing cycling pages and added new routes.

**Nature Tourism** is an important part of the Lincolnshire offer and there are some exciting developments which will be of interest to our visitors. The vastly bigger Coronation National Nature Reserve, formerly known as Saltfleetby/Theddlethorpe; the new National Trust reserve at Sandilands; investment at The Royal Society for the Protection of Birds (RSPB) Frampton Marsh; Boothby Wildlands and Wilder Doddington. We are half-way through completing our offer to the bird watching market: there is now a Coastal Trail and a Wolds Trail, and we just need to complete a Fens Trail and one for Western Lincolnshire giving us coverage for the whole county. Much of the work on the Bird Trails has been done by Lincolnshire Bird Club, Lincolnshire Wildlife Trust (LWT), RSPB and the Greater Lincolnshire Nature Partnership. They are written in a very accessible style, providing insider tips on the best places to go and what to find.

When [www.visitlincolnshire.com](http://www.visitlincolnshire.com) was launched in 2021 it was still lockdown and Events was an area that was paused as not a priority. The **Events** area has now been developed and is thriving, a great driver of traffic to the website and very good for our search engine optimisation; as well as being an effective way to refresh the homepage content look and feel as the events calendar automatically refreshes over time as events come and go.

Increasingly visitors are interested in '**Experiences**' and it is common for people to gift trips, afternoon teas, event tickets, learning opportunities and so on. Making memories instead of buying 'things'. To encourage businesses to take advantage of this shift in consumer and visitor behaviour we have produced a toolkit [Lincolnshire Experience Maker Toolkit - Business Lincolnshire \(visitlincolnshire.com\)](#) to help them put together experience packages. We have also launched a brand new Experience section on the visitor site, which consists of a new Experience page in the main navigation along side product 'widgets' on individual business' pages which link to this page. We do recognise the businesses need encouragement and imagination to develop ideas and so we have partnered this activity with support from the Business Lincolnshire Growth Hub Specialist Advisor to assist with product development and diversification. However, we do not see Experiences as a short-lived trend, so it is worth our investment.

**Film Tourism** has been identified by VisitEngland as a key visitor trend – and especially the activity of visiting locations that have been featured in popular film and television productions. This is termed 'Set Jetting'. We have developed new pages on the website that highlight key filming locations in the county, and this will further develop to include suggested itineraries that visitors can create full days out enjoying stepping in the footsteps

of their favourite tv and film characters. This work is supported by a comprehensive social media schedule of activity too.

### **Environmental Impact Support**

Toolkits are a simple way of supporting businesses and seem to work well. Toolkits support any training that we are able to run or can be used independently by businesses. As well as the Experiences Toolkit and the Green Tourism Toolkit, a toolkit has just been produced for the King Charles III England Coast Path (KCIIECP), the Lincolnshire section of which is due to complete in early 2025. There are many business opportunities that will be created by this path and with a year to go time to put plans in place.

A short series of face-to-face business workshops will be run in the Spring / Summer to bring the KCIIECP Toolkit to life and explore opportunities and potential partnership working with complementary businesses – all with the aim of bringing new tourism product to market and encouraging coast path usage.

The Green Tourism Toolkit is to be rebranded as the Green Hospitality Toolkit and a number of retail case studies are to be added. The toolkit contains a wealth of helpful information that is useful to a wider sector than just tourism hence the renaming. In 2023 there were 679 users, 974 sessions and 1,601 page views. We continue to present the toolkit and its contents at various tourism and hospitality face to face networking events across the region. To date this has included events in North, North East Lincs and also East Lindsey.

### **Visitor Economy Business Development Support**

Through the Business Lincolnshire Growth Hub, we offer fully funded specialist visitor Economy advice and support covering Greater Lincolnshire and Rutland (excluding Boston, East Lindsey, and South Holland, who have a separate offer) Lincoln City, North Kesteven, South Kesteven and West Lindsey, through our adviser Hayley Toyne.

Common support themes include product development and understanding where gaps in current product offers may exist, Public Relations (PR) and communications including fully utilising existing promotional channels available to businesses (i.e., Visit Lincolnshire website and social media, other destination marketing providers), help with online bookability, grant finding, and help with legislation and regulation updates (for example single use plastics, or package holiday regulations).

During lockdown our tourism businesses asked for accessible business development support and we developed [www.business.visitlincolnshire.com](http://www.business.visitlincolnshire.com) which features around 70 especially filmed masterclass videos along side a selection of other support options including downloads, templates, guides, further reading, and the aforementioned toolkits

Working with the Business Lincolnshire Growth Hub we have developed a number of training programmes, including the current programme **Your Business Boost** this is a strategically designed business support initiative aimed at propelling businesses in the Retail, Hospitality, and Leisure sectors toward their fullest potential. The programme recognises their unique challenges and opportunities and tailors its approach accordingly, through a series of themed interventions. To date we have supported just under one

hundred businesses that have accessed the masterclass based programmes Feedback includes *“Really great sessions lots of things to take away and think of. Already changed the home page on our website”*. *“Thank you for a fantastic session - the best yet. So much information and helpful guidance. Thanks again.”* *“Another great session - thank you. Some insightful ideas for expanding our business’ green credentials”*. Positive feedback encourages us to put on more courses when funds are available.

We have also been working to support the Inward Investment activities in terms of working in partnership to produce a **Film Location** offer and Visitor Economy Investment opportunities.

Increasingly, production companies are looking for new and interesting locations to film in. Showcasing our beautiful county to an international audience is fabulous for our tourist industry and our reputation. But we also see economic benefits while film companies are here – to our hospitality, catering and other local businesses.

Lincolnshire County Council is a member of the Filming in England Partnership working with Creative England. This means our tourism staff actively work with local partners and national agencies to welcome filming to Lincolnshire, helping companies to find great locations in our county to assist film and TV productions.  
<https://www.visitlincolnshire.com/press/lincolnshire-film-tv-location-service>

This activity complements the visitor facing work on Visit Lincolnshire.

While currently a ‘challenger location’ to the UK’s most famous tourism destinations, the area’s visitor offer aligns closely with high-growth market segments of recent years, and projected demand for ‘staycations’ from UK residents in the post-pandemic era. In a growing domestic market, potential cost advantages versus ‘hotspot’ locations further add to Greater Lincolnshire’s visitor appeal.

For businesses investing in the UK’s visitor economy, this means profitable opportunities across a range of areas showing evidence of good demand and constrained supply, including hotels, pubs, other accommodation, major visitor attractions and services including restaurants and cafés. Lincolnshire’s vision is to become the destination of choice in the UK’s thriving domestic and international tourism market.

<https://business.visitlincolnshire.com/resources/commercial/investment-opportunities>

### **Local Visitor Economy Partnership**

Moving forward, we are working in partnership with Visitor Economy bodies across Greater Lincolnshire to align under the new Local Visitor Economy Partnership accreditation.

Visit England is changing the structure of tourism through the creation of circa 40 Local Visitor Economic Partnerships (LVEPs). In November Destination Lincolnshire submitted a LVEP accreditation application on behalf of Greater Lincolnshire and Rutland, which has now been approved.

LVEPs will be strategic and high performing and will be accredited by Visit England. They will lead, manage, and market destinations, collaborating both locally and nationally. Each LVEP is to have a Destination Management Plan.

Destination Lincolnshire is leading a Destination Management Plan (DMP) for Greater Lincolnshire and Rutland. Work started in July, and it will be finished by February 2024 with sign off and adoption of the plan expected in March 2024. It will be aligned to the LVEP policy and emerging devolution conversations. LCC endorse the LVEP and are a co-funder of the DMP.

From our point of view, our contribution to the county's tourism includes, but is not limited to, the operation of [www.visitlincolnshire.com](http://www.visitlincolnshire.com) as an "attract and disperse" website, delivery of business support to a wide range of SMEs in the tourism sector, both 1:1 and backed up by [www.business.visitlincolnshire.com](http://www.business.visitlincolnshire.com), and product development based on nature and on outdoor walking, and the development of thematic itineraries. We see our ability to commission training through our Adult Education and Multiply budgets to be an important opportunity to tackle the skills needs in the sector.

## 2. Conclusion

[www.visitlincolnshire.com](http://www.visitlincolnshire.com) is crucial to everything we do and whilst it is delivering very well as an attract and dispersal website, it still has enormous potential for development. We particularly value your thoughts on encouraging its use by residents.

Our vision is that the website will continue to be **"A beautifully curated, expertly delivered, online platform that adds value to Lincolnshire businesses by inspiring and attracting consumers to our product offer; and converting them to purchase/consume; and extend their stay"**.

The Environment and Scrutiny Committee are invited to review the impact and progress to date and endorse our role within the wider Local Visitor Economy Partnership.

## 3. Consultation

### a) Risks and Impact Analysis

N/A

## 4. Background Papers

No background papers within Section 100D of the Local Government Act 1972 were used in the preparation of this report.

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