

Tourism and Visitor Economy Scrutiny

DATE	05/10/2023
REPORT OF	Carolina Borgstrom, Director Economy, Environment, Infrastructure
SUBJECT	North East Lincolnshire Tourism Dashboard, 2022
STATUS	Open

CONTRIBUTION TO OUR AIMS

Tourism and the Visitor Economy are important sectors for North East Lincolnshire (NEL) and fundamental in their contribution to place-making and achieving a Stronger Economy and Stronger Community. Place-making is one of the four cornerstones of NEL's Economic Strategy 2021, and at the heart of the Council's Plan, ensuring that our towns are great places to live, work, visit and stay. A key objective is to enhance the visitor experience and promote civic pride, creating a year-round tourism offer through marketing activities and offering a diverse event and cultural programme for local people and for attracting more visitors to visit and stay.

EXECUTIVE SUMMARY

The information included in this report, summarises the data and statistics for the 2022 tourism season in NEL, reported via the Scarborough Tourism Economic Assessment Monitor (STEAM) and from other local data sources and intelligence. The report includes data which gives a snapshot of the key economic statistics and trends year on year and highlights some key economic indicators including visitor days (day visits and overnight stays), employment numbers across the sector, footfall figures, visitor attraction statistics and direct feedback from visitors themselves. This information is important for helping to inform and guide our strategic approach for addressing the key objectives of NEL's Tourism Action Plan.

MATTERS FOR CONSIDERATION

The Tourism Dashboard 2022 is presented to scrutiny for consideration; to highlight its purpose as valuable context and background to help deliver and monitor NEL's Tourism Action Plan and for panel members to highlight any areas of concern.

1. BACKGROUND AND ISSUE

1.1 Background

The Tourism Dashboard slides appended to this report, Appendix 1, give a year-on-year comparison of information to establish general trends in the sector. The slides include a summary of information from various data sources including, the key economic and visitor statistics extracted from the 2022 STEAM reports for NEL, footfall figures, social media and web statistics, visitor attraction and event numbers, and some direct feedback from visitors obtained through a visitor survey.

NEL is annually assessed by Global Tourism Solutions (UK) Ltd who put together a STEAM report, which gives a measure of the key tourism economic impacts and reveals trends which help highlight areas of growth, or in need of support.

STEAM is recognised nationally and internationally as a research programme which aims to measure the impact of tourism from both staying and day visitors, in terms of expenditure, employment, tourist numbers and days generated by tourists. The STEAM model is used by many Destination Management Organisations and Local Authorities, including Lincolnshire County Council and the district Councils.

2.0 Tourism Dashboard for North East Lincolnshire (Appendix 1)

2.1 STEAM Data

Slides 1 and 2 present the key tourism data comparisons for 2022 vs 2021. The headline statistics demonstrate good increases year on year.

- Economic impact (+25.7%)
- Visitor numbers (+14.2%)
- Total visitor days and nights (+14.6%)

It is interesting however, to compare the 2022 position versus pre-pandemic figures in 2019. Although progress is being made, the headline data in Table 1 shows that the 2022 figures are still less than 2019 levels. Job numbers in 2022 are down by approximately 1,000 compared to 2019. There is evidence that, in the hospitality sector for example, there are many job vacancies which cannot currently be filled. The sector will therefore need to address the challenges of negative perceptions (having a job versus embarking on a professional career route), seasonality, and lower wages.

Table 1

Visitor Numbers	2017	2018	2019	2020	2021	2022
NEL	10.20 million	10.34 million	10.30 million	4.68 million	7.52 million	8.59 million

Visitor Days & Nights	2017	2018	2019	2020	2021	2022
NEL	12.66 million	12.83 million	12.83 million	5.88 million	9.635 million	11.04 million

Jobs	2017	2018	2019	2020	2021	2022
NEL	6,959	7,168	7,160	3,442	5,253	6,176

Economic Impact	2017	2018	2019	2020	2021	2022
NEL	£589.28m	£622.09m	£642.26m	£308.95m	£506.01m	£636.23m

One key tourism objective is to increase the number of overnight staying visitors. It is therefore interesting to note in slide 2 that the 2019 figure of 6% has risen to 7.1% in 2022. It is encouraging to see that people are choosing to 'staycation' in the UK.

Slide 3 shows that the tourism season continues to demonstrate a typical schedule of seasonality, with April – June being the busiest months for visitors in 2022.

Slide 4 highlights local data, such as attraction/event numbers including Immingham Museum, Grimsby Fishing Heritage Centre (GFHC), and the Time Trap. Also included are the Auditorium and Leisure Centres, which are managed by Lincs Inspire. This slide reflects the fact that during 2022 many attractions and venues were fully open and visitor numbers have therefore increased year on year for all venues listed.

Slide 5 features the Meridian Showground (MSG) which is a council operated venue for event organisers to deliver a variety of events. The delivery of events is critical for attracting local and visiting audiences, generating footfall, and encouraging more people to spend locally, which in turn creates economic benefits for the sector. Events at the MSG also give the opportunity for local food and drink vendors to trade as well as local infrastructure such as marquee hire, stage, and lighting etc. The MSG was very busy during 2022, being hired out for 97 days versus 49 days in 2021. The hire days are back to the pre-covid 2019 level which had 98 hire days. Fifteen events were held during 2022 with four brand new ones: Planet Circus; CleeW; Pride; and Halloween outdoor cinema.

2.2 Footfall Statistics

Slides 7 and 8 provide the footfall figures in Grimsby and Cleethorpes during 2022. The monthly measurement of footfall in an area is a standard measurement of 'visitor' numbers and is useful in highlighting general trends. There are two counters in Cleethorpes, one outside the Thomson holiday shop near Boots on St Peter's Avenue and a second counter is located on the seafront outside the entrance to the Pier. The Grimsby counters are located on the intersection outside McDonalds and the entrance to Freshney Place, St James' Square and Riverhead Square.

The 2022 Cleethorpes promenade figures show a slight year-on-year improvement, but the 2022 rates are not quite back to pre-pandemic levels which in 2019 were 1.9 million. The busiest footfall month in 2022 was August (306,862).

From a retail perspective the total footfall in 2022 for St Peter's Avenue in Cleethorpes was an encouraging 13% improvement versus 2021, at approximately 1.5 million. The 2022 rates are approaching pre-pandemic levels which in 2019 were 1.7 million. The busiest months were June (161,876) and March (154,478).

The high street area of Victoria Street, Grimsby can be seen to be improving against the previous year, with 3.3 million in 2022 versus 2.9 million in 2021. The 2022 rates are not yet back to the 2019 footfall levels which were significantly higher at 4.2 million. As per 2021, the busiest months during 2022 were September (359,658), supported by the inaugural Grim Falfest event and June (324,222).

The footfall counters at St James Square and Riverhead Square were installed in Aug 2021 and so year on year comparisons cannot yet be made.

2.3 Visitor Survey

Some survey work was carried out by the resort team in Cleethorpes during the summer of 2022 and the visitor feedback is highlighted in Slides 9 and 10. Although it is a snapshot, this feedback helps to give an understanding of where our visitors come from and how they travel to us. The information therefore helps the development of our future marketing campaigns and decide who, and where, we need to target any promotional activity.

Of the 64% of 'out of the region' visitors surveyed, 53% came from over 50 miles away, for example, Sheffield, London, Manchester, and Nottingham and 10% from Lincolnshire and Hull. A total of 59% of those surveyed, travelled by car, 11% by train and 2% by coach. When asked about favourite things to do in Cleethorpes, 67% stated that they came because of the beach. General feedback was that there is plenty to do in Cleethorpes and it is a family friendly resort.

2.4 Social Media Statistics

Slide 11 shows a continued positive upward trajectory of followers for the Discover NEL social media channels, including Instagram and Facebook. An increase in the number of followers means that it is possible to extend the reach to people locally and out of the region, and promote the area, events and activities taking place here. Our social media platforms are grown through creating unique content posted daily highlighting our key offers to visitors. We collaborate with businesses and stakeholders when we can, putting out regular call outs to businesses to contribute so that we can promote them. We also join up with local businesses and accommodation providers to run competitions which require people to sign up to our accounts.

There was a large boost in Qtr 1 2022 for Facebook's reach which was because of a short video of an Elvis act as part of the Love Grimsby event. This video went viral on social media and was shared widely, hence the spike.

Social media has played a developing role over the last few years in promoting events and gathering interest in events hosted within the MSG which is managed by the council. Since 2018, the number of followers on social media platforms has risen from 5,301 in 2021 to 6,403 in 2022. An additional 49 followers were gained on Instagram.

2.5 Web Statistics

Slide 12 is an overview of the web statistics for the Discover NEL website (www.discovernortheastlincolnshire.co.uk) which was relaunched in May 2021 to help raise awareness of the area as a visitor destination. Through the 'Inspire me' section, different ideas and itineraries are suggested including: NEL in 80 ways; top ten tips to discover; family fun; and nature and outdoors. The website shows good levels of growth since its relaunch, with August 2022 having the highest number of visits as you would expect for a visitor destination website.

3.0 Delivering against the Tourism Action Plan

The strategic tourism team continues to focus on delivering the key tourism objectives in the Tourism Action Plan, previously presented to TVE Scrutiny in March 2022.

3.1 Objective 1: Increasing overnight visitor numbers.

Funded through the UK Shared Prosperity Fund (UKSPF), in quarter four of the 2022/23 financial year the team devised an out of area marketing campaign called '*Coast Lovers Wanted*', to encourage visitors to stay overnight, or longer, in NEL. The target areas covered Doncaster, Barnsley, Rotherham, Nottingham and Derby, and the activities included radio advertising, bus stops, supermarkets, train stations, Humberside Airport, and press adverts. The activities also included a digital marketing campaign. Similar plans are in motion to deliver campaigns during 2023-24 and capitalise on the growth of Discover NEL.

3.2 Objective 2: Raising awareness of NEL as a visitor destination.

As well as the relaunch of the Discover website, the NEL Visitor Guide for 2022-23 was distributed throughout Greater Lincolnshire and outside the area. The link to the visitor guide is here: [North East Lincolnshire Visitor Guide 2022/23 by discovernortheastlincolnshire - Issuu](#)

A 'What's On' guide was also produced to promote the events and activities taking place in the MSG and throughout the borough. A PDF is attached with this report.

National publicity is also very important in promoting the area, and the tourism team supported a press trip by luxury food writer, Baldwin Ho, who visited in February 2022. Healing Manor's Tasting menu was heavily featured in the article. [Lincolnshire: A gourmet destination to inspire the senses | Luxury Lifestyle Magazine](#) As some useful background, this publication showcases five-star travel, fine dining, exclusive property, luxury interiors, high performance cars etc. It has a 139.7K unique visitors per month and its audience profile are from the UK, followed by North America. 89% of their audience has an average household income of more than £150K.

3.3 Objective 3: Extending the traditional tourism season.

As per Slide 6, 'The Gathering' is a popular event held at the MSG which attracts many people from out of town (3,700 people attended in 2022). This event is growing in popularity year on year and the image included below, shows the locations of tickets sales for 2024, during its first 2 weeks of their release. This is a good example therefore of the scale of where people are travelling from and with the event ending at 11pm, it is guaranteed that people are staying over in NEL. If people stay overnight, then not only do accommodation providers benefit, but so do other hospitality and tourism businesses.



The Gathering – Ticket Sales for 2024

In addition to the delivery of an increased number of events at the MSG during 2022, the area also hosted several events as further detailed in Slide 6. Delivered by either the council or by third party event organisers, these events increased footfall, and visitor numbers to the area and also gave the local community the opportunity to engage in a wide range of cultural experiences throughout the year.

3.4 Objective 4: Supporting tourism businesses.

We continue to engage with tourism businesses throughout the year, raising awareness of the tourism awards they can enter and of Destination Lincolnshire events and activities.

Through our Discover social media channels, we ask businesses for input into campaigns and social media content, trader opportunities at events, taking part in activities such as the Lincolnshire Show (Cleethorpes Coast Light Railway and Caxton Theatre), possible participation in TV shows such as the Susan Calman series, and opportunities to distribute their promotional materials.

3.5 Objective 5: Have a clear vision for the future development and regeneration.

The Cleethorpes Masterplan, which was adopted by Cabinet in March 2022, provides the framework to guide and encourage development, both private and public, over the next 10 years to maximise the opportunities for economic growth, supporting the tourism and visitor economy. During 2022 a Levelling Up (LUF) application was submitted for Cleethorpes, namely, Market Place, the Sea Road new building, and Pier Gardens. In January 2023 the Cleethorpes LUF application secured £18.4m.

4. RISKS AND OPPORTUNITIES

4.1 There is an opportunity to positively promote NEL to visitors from outside the area, encouraging them to visit and stay, thus creating economic benefits for businesses and the local community.

4.2 There is a risk that with the current cost of living crisis, it is challenging to encourage more visitors to visit and stay in NEL. This could have a detrimental effect on the recovery of local businesses.

5. REPUTATION AND COMMUNICATIONS CONSIDERATIONS

The promotion of the tourism and visitor economy will positively enhance the status of NEL as a place to invest, work, visit and stay. We will engage and consult as required, with key stakeholders, businesses, and the public to ensure that their aspirations for the future of NEL have been fully considered in our projects, events, campaigns, and promotional activities.

6. FINANCIAL CONSIDERATIONS

All promotional activities and campaigns targeting the tourism and the visitor economy sector are financed through an annual tourism revenue budget and there will therefore be no call on council reserves. UKSPF has also supported further campaign work as reference in this report. By increasing visitor numbers to NEL there will be economic benefits for the whole area, including businesses and third-party suppliers and accommodation providers etc.

Though the hire of the MSG and other council owned facilities, such as the GFHC and the Time Trap, there are income generating opportunities for the council.

7. CHILDREN AND YOUNG PEOPLE IMPLICATIONS

There are no direct or material implications arising from this report for children and young people. The proposals outlined, however, support the council's overriding priorities and will provide further health and well-being, social, and economic opportunities for young people. By enhancing the place, our objective is to make NEL a more attractive area for children and young people to work, live, visit and stay.

8. CLIMATE CHANGE AND ENVIRONMENTAL IMPLICATIONS

The place agenda, and promotion of tourism and the visitor economy for NEL, considers the council's published commitments on climate change and the environment, particularly within the context of the resort and beach areas having special ecological designations such as the Site of Special Scientific Interest (SSSI). Consideration is given to the green agenda and recognition of the council's nature stewardship obligations as documented in Cleethorpes' Habitat Management Plan. From a tourism and visitor economy perspective we seek opportunities to improve green spaces and connectivity between sites to promote walking and cycling, promotion of biodiversity, natural habitats and integrating energy and water efficiency into conservation management.

9. MONITORING COMMENTS

In the opinion of the author, this report does not contain recommended changes to policy or resources (people, finance, or physical assets). As a result, no monitoring comments have been sought from the council's Monitoring Officer (Chief Legal Officer), Section 151 Officer (Director of Finance) or Strategic Workforce Lead.

10. WARD IMPLICATIONS

All Wards in NEL will benefit from the promotion of tourism and the visitor economy, thereby making the area one that is attractive to work, live, visit and stay.

11. BACKGROUND PAPERS

None

12. APPENDICES

Appendix 1 - Tourism Dashboard 2022

Appendix 2 – PDF What's On Guide 2022

13. CONTACT OFFICER(S)

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Appendix 1
NEL Tourism Dashboard 2022

Slide 1 – Key Economic Indicators

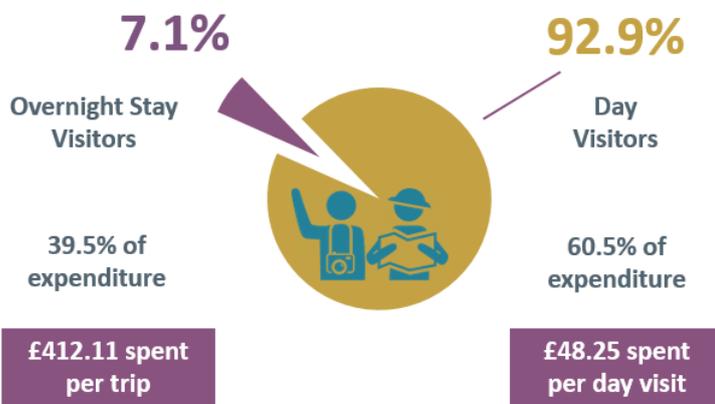
2022 North East Lincolnshire's Visitor Economy



Source: Global Tourism Solutions (UK) Ltd – NEL's 2022 STEAM report

Slide 2 – Key Economic Indicators

2022 North East Lincolnshire's Visitor Economy

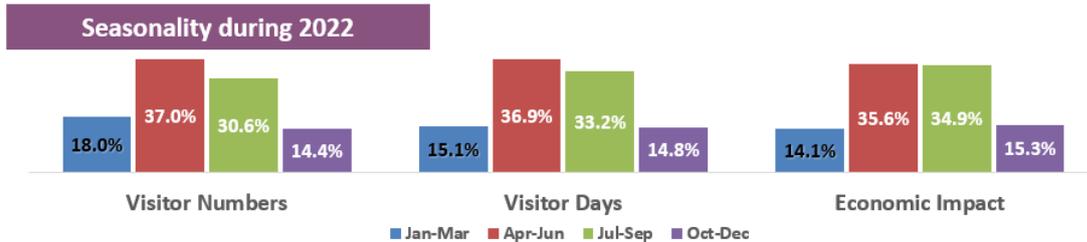


Source: Global Tourism Solutions (UK) Ltd – NEL's 2022 STEAM report

Some figures have been rounded to the nearest whole number where relevant.

Slide 3 - Seasonality

2022 North East Lincolnshire's Visitor Economy



Source: Global Tourism Solutions (UK) Ltd – NEL's STEAM reporting

Slide 4 – Attractions / Visitor Numbers

North East Lincolnshire's Visitor Economy 2022 TOURISM DASHBOARD



Source: Attractions, Springboard Footfall counters and Rail Data Portal

Slide 5 – Meridian Showground Key Statistics

2022 North East Lincolnshire's Visitor Economy



15 Events held in 2022
(incl AFD use & ABP use)

4 New Events in 2022
CLEEW
Planet Circus
PRIDE
Halloween Outdoor Cinema

£41k
Hire Fee Income 2022/3
[Up 21% from 2019]



What's been on at MSG?
Planet Circus (February)
Race for Life (May)
Fake Fest (May)
Pop Live (June)
Gathering Fest (June)
Scooter Rally (July)
CleeW (July)
Pride (July)
Outdoor Cinema (August & October)
Tuckers Fun Fair (3 visits Apr-June-Aug)

Event Variety
Fair/Circus – 4
Music – 3
Sports – 1 (+ ABP Half Marathon)
Outdoor Cinema – 2 (over 5 nights)
Culture/Arts – 0
Niche – 2 (CleeW, Scooter Rally)
Community – 2 (Pride & AFD use)

Slide 6 – North East Lincolnshire Events

North East Lincolnshire’s Visitor Economy 2022 TOURISM DASHBOARD



*Estimated Source: Event organisers

Slide 7 – Footfall in Cleethorpes

North East Lincolnshire’s Visitor Economy 2022 FOOTFALL - Cleethorpes



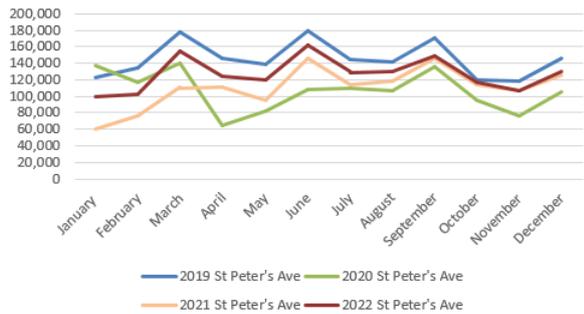
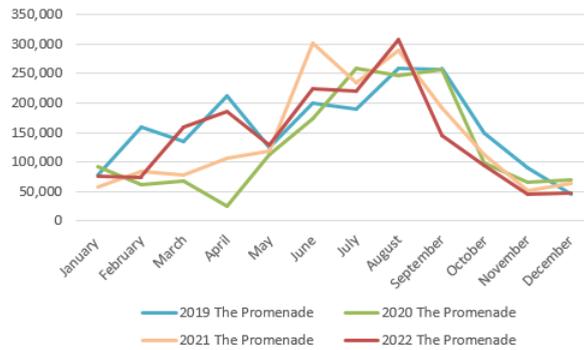
**Footfall
2022**

**Cleethorpes
The Promenade
1,711,436**

2021 – 1,691,354
2020 - 1,523,561
2019 - 1,905,128

**Cleethorpes
St Peter’s Avenue
1,525,365**

2021 – 1,324,124
2020 - 1,279,215
2019 - 1,739,152



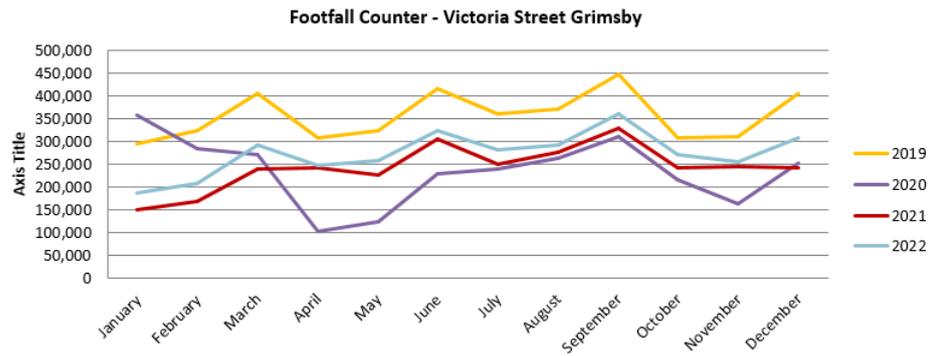
Slide 8 – Footfall in Grimsby

North East Lincolnshire's Visitor Economy

2022 FOOTFALL – Grimsby town centre



Footfall
2022



**Grimsby
Victoria Street**
3,281,879

2021 – 2,909,522
2020 - 2,863,002
2019 - 4,273,159

**Grimsby
St James Square**
1,639,660

2021 – 566,378
[Installed August 2021]

**Grimsby
Riverhead Square**
1,477,288

2021 – 499,757
[Installed August 2021]

Slide 9 – Visitor Survey

North East Lincolnshire's Visitor Economy 2022 Visitor Feedback



 **526 visitors were surveyed during 2022** (April-December)

300 during April-May-June
152 during July-August-September
74 during October-November-December

 **Where were respondents from?**
64% were from outside the area (36% were local residents)
10% were from Lincolnshire/N Lincs/Hull, 53% from at least 50 miles away

Sheffield, Derby, Leicester, Doncaster, Barnsley, London, Hull, Manchester, Lincoln, Scunthorpe, Leeds, Lincoln, Nottingham, Scotland
plus visitors from Holland, Australia and Switzerland

 **Getting here**
59% by car
11% by train
2% by coach

 **How long did they stay?**
Day trip 36%
1 night 3%
2-3 nights 15%
4-5 nights 6%
A week 5%
<1 week 0.4%
(Locals 34%)

 **Where did they stay?**
Caravan/Camping 47%
Hotel 12%
B&B 21%
Family & Friends 14%
[not stated 7%]

Slide 10 – Visitor Survey

North East Lincolnshire's Visitor Economy 2022 Visitor Feedback



Reason for Visiting ...

21% said they were here for the Beach
4% were here on holiday or a daytrip
14% were here to walk
2% were visiting friends & family
Other reasons included nature watching, shopping, dog walking, here for an event

Favourite things about Cleethorpes

Top answer 'THE BEACH' (67%).
Other favourites were
Local attractions, Walking and Cycling, Food and Drink, Fish and Chips, the arcades.

Visitors sited Cleethorpes had LOTS TO DO and was family friendly!

[226 were asked if they had visited before, 24% hadn't been]

What did new visitors think about Cleethorpes?

'Felt like we've been everywhere but here. It was time to visit.'

'Prefer it here to Skegness',

'We love the seaside. Wanting to retire and relocate',

'Wanted to visit the seaside for a holiday

(never been to Cleethorpes before)',

'Husband visited as a child, I have never been, beautiful seaside',

'The beach, something for us all. Kids love the beach & arcades.

So much to do',

'Staying in Lincoln, wanted to see the seaside, really impressed so far.

Just visited Papa's for fish & chips',

'Everything has been fantastic',

'The view, everything is close by'

'Loved it, can't wait to come back'

'Never visited before, family have been for a trip previously and recommended area.'

Things that visitors didn't enjoy ...

Comments included :

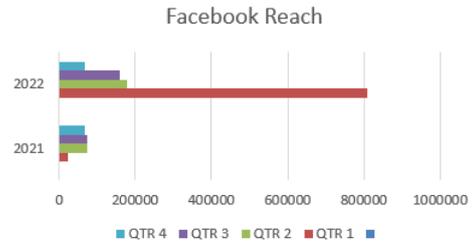
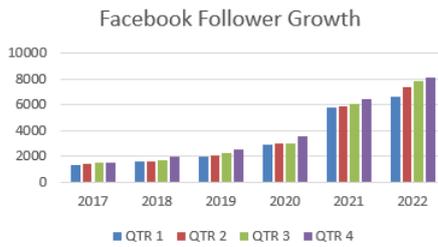
Train strikes, disrupted bus schedules, toilets, the weather, lack of feet washing facilities, lack of facilities at Fitties end.

Slide 11 – Social Media Statistics (Discover North East Lincolnshire)

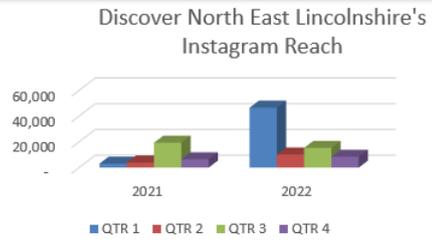
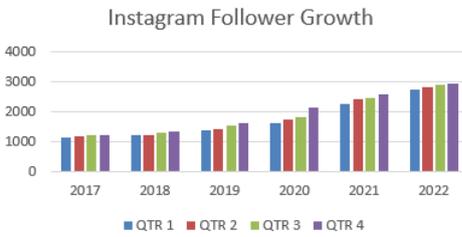
North East Lincolnshire’s Visitor Economy 2022 TOURISM DASHBOARD



Social Media Growth for Discover North East Lincolnshire



8,700 Facebook followers as at June 2023



3,080 Instagram followers as at June 2023

Source: Social media stats

Slide 12 – Web Statistics (Discover North East Lincolnshire)

North East Lincolnshire’s Visitor Economy 2022 TOURISM DASHBOARD

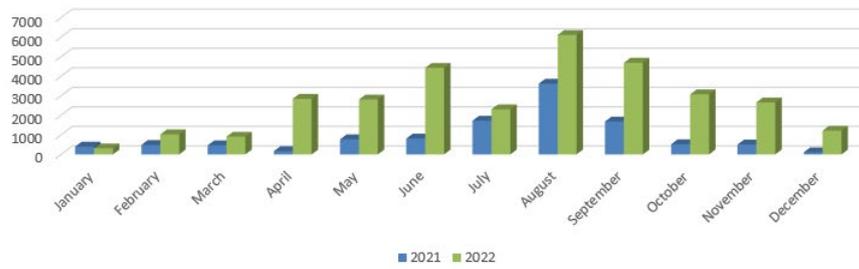


Web User Growth

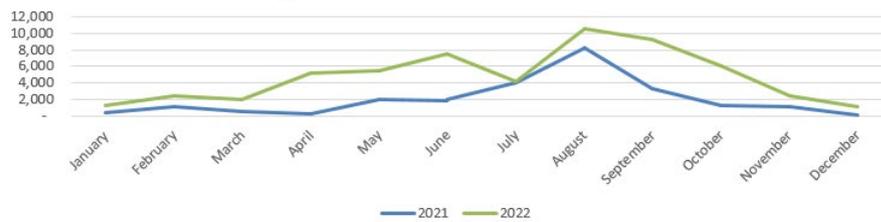
Website launched May 2021

Hits show expected seasonality

Visitors to DiscoverNorthEastLincolnshire.co.uk



Number of Page Views of DiscoverNorthEastLincolnshire.co.uk



Source: Web Stats

Appendix B: What's On Guide 2022

Appendix B is a pdf leaflet comprised of images depicting events.