

Tourism and Visitor Economy Scrutiny Panel

DATE	29/09/2022
REPORT OF	Sharon Wroot, Executive Director Place, Environment, Economy & Resources
SUBJECT	North East Lincolnshire Tourism Dashboard, 2021
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 commitment to 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 2021 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 2021 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 ISSUES

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 2021 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. All the information presented in the slides needs to be set against the context of the pandemic and consider the fact that the tourism and visitor economy sectors were significantly impacted throughout the

lockdown periods during 2020 and 2021.

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 2021 vs 2020. Although the Visitor Economy sector continued to be impacted by lockdowns in the early part of 2021, the headline statistics demonstrate signs of recovery compared to 2020.

- Economic impact (+63.8%)
- Visitor numbers (+60.7%)
- Total visitor days and nights (+63.8%)

It is interesting however, to compare the 2021 position versus pre-pandemic figures in 2019. Signs of recovery are evident, but in the headline data shown in Table 1, the 2021 figures are still less than 2019 levels with recovery to approx. 75% of pre-pandemic levels across key indicators. Job numbers in 2021 are down by nearly 2,000 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

<u>Visitor Numbers</u>	2017	2018	2019	2020	2021
NEL	10.20 million	10.34 million	10.30 million	4.68 million	7.52 million

<u>Visitor Days</u>	2017	2018	2019	2020	2021
NEL	12.66 million	12.83 million	12.83 million	5.88 million	9.635 million

<u>Jobs</u>	2017	2018	2019	2020	2021
NEL	6,959	7,168	7,160	3,442	5,253

<u>Economic Impact</u>	2017	2018	2019	2020	2021
NEL	£589.28m	£622.09m	£642.26m	£308.95m	£506.01 m

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% in 2021. Although there is no specific intelligence as to why this figure has increased, it is evident that the pandemic encouraged more people to 'staycation' in the UK.

Slide 3 shows that the tourism season is starting to return to a more typical schedule of seasonality, with July-September being the busiest month for visitors. During lockdown, out of the area visitors came to Cleethorpes during the non-traditional tourism season, to take advantage of opportunities to exercise in outside spaces.

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 2021 many attractions and venues were still closed for the early part of the year. The GFHC, for example, was not able to fully open to the public until May 2021 which is reflected in the lower visitor numbers versus 2019.

2.2 Footfall Statistics

Slides 5 and 6 provide the footfall figures in Grimsby and Cleethorpes during 2021. 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 counter is located on the intersection outside McDonalds and the entrance to Freshney Place.

The 2021 Cleethorpes promenade figures show a good recovery of footfall and an improvement year-on-year, from 1.5 million in 2020 versus 1.7 million in 2021 which supports the feedback from the resort team about how busy the resort was last year. The 2021 rates are not quite back to pre-pandemic levels which in 2019 were 1.9 million. The busiest footfall month in 2021 was June (reported as a 5-week month) with 302,000, closely followed by August with 290,000.

The total footfall in 2021 in St Peter's Avenue in Cleethorpes was comparable to 2020, at approximately 1.3 million. The 2021 rates are not back to pre-pandemic levels which in 2019 were 1.7 million. The busiest months were June and September with a total of 145,000 each.

The high street area of Victoria Street, Grimsby can be seen to be improving against the previous year, with 2.9 million in 2021 versus 2.8 million in 2020. The 2021 rates are not yet back to the 2019 footfall levels which were significantly higher at 4.2 million. The busiest months during 2021 were September with 328,000 and June with 306,000.

2.3 Visitor Survey

Some survey work was carried out by the resort team in Cleethorpes during August 2021 and the visitor feedback is highlighted in slide 7. 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 76% of 'out of the region' visitors surveyed, 28% came from Yorkshire and 17% from Lincolnshire/Scunthorpe. A total of 79% of those surveyed, travelled by car and 6% by train. It should be noted that train travel was still being affected by the pandemic during 2021. More than half of those surveyed stated that they came because of the beach. A total of 47% said that more toilets were needed in Cleethorpes. A total of 11% said that nothing was missing from Cleethorpes.

2.4 Social Media Statistics

Slide 8 shows a 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 collaboration with businesses and key stakeholders and by helping to promote them and their services, products, and events, we are therefore introduced to their networks of followers. We also join up with local businesses and accommodation providers to run competitions which require people to sign up to our accounts.

Social media has played a developing role over the last few years in promoting events and gathering interest in events hosted within the Meridian Showground (MSG) which is managed by the council as part of its management and operation. Since 2018, the number of followers on social media platforms has risen from 2512, to 5301 in 2021.

2.5 Web Statistics

Slide 9 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 2021 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 Increasing overnight visitor numbers.

Funded through the Welcome Back Fund, in quarter four of the 2021/22 financial year the team devised an out of area marketing campaign called '*More than just a Daytrip*', 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 stop and press adverts. Similar plans are in motion to deliver campaigns during 2022-23 and capitalise on the growth of Discover NEL.

3.2 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: <https://bit.ly/3R7vKSe>

A 'What's On' guide was also produced to promote the events and activities taking place in the MSG and throughout the borough. If there are sufficient events to promote, another 'What's On' guide will be developed for the coming Autumn/Winter/early New Year period.

National publicity is also very important in promoting the area, and the tourism team supported a visit by a journalist from the Guardian which resulted in the following article, '*Gourmet Haddock and Lilac Skies: a car free break in Grimsby and Cleethorpes*', being published in September 2021. [Gourmet haddock and lilac skies: a car-free break in Grimsby and Cleethorpes | Lincolnshire holidays | The Guardian](#)

3.3 Extending the traditional tourism season.

The delivery of events is critical for attracting local and visiting audiences, generating footfall, and encouraging more people to spend locally, which in turn supports the recovery of the sector. The MSG was hired out for 49 days in 2021. This was down by 50% from 2019 due to COVID and the fact that no events could take place prior to the end of July unless they were deemed COVID safe. The 2022 season at the MSG has been much busier, the details of which will be reported in a future report.

3.4 Supporting tourism businesses.

During the pandemic it was possible to build good communication channels with local tourism businesses, by providing regular updates and Government COVID information to businesses with support to help aid their recovery. Over eighty tourism related businesses were supported with COVID related queries, licencing information, and establishing contact with new businesses and representatives, along with requesting their input into future activities such as social media campaigns and trading opportunities.

3.5 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. Three projects have been included in a Levelling Up Fund application, namely, Market Place, the Sea Road new building, and Pier Gardens. In addition, the council is progressing a regeneration project for the North Promenade, subject to funding being secured.

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 following the pandemic, 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. 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 2021

13. CONTACT OFFICER(S)

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Sharon Wroot
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Appendix 1
NEL Tourism Dashboard 2021

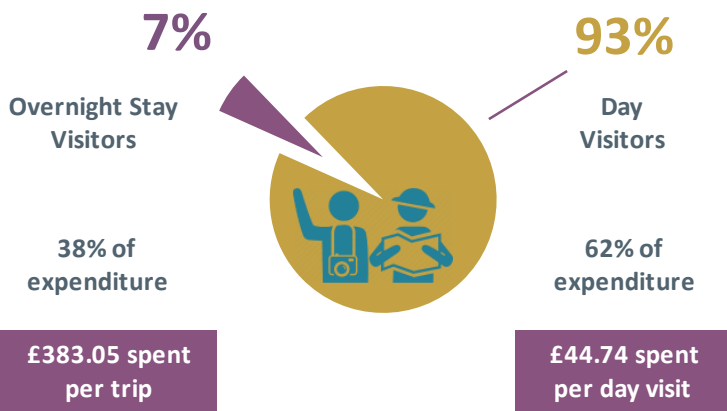
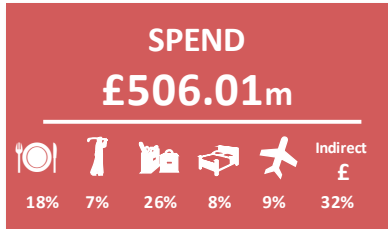
Slide 1

2021 North East Lincolnshire's Visitor Economy



Source: Global Tourism Solutions (UK) Ltd – NEL's 2021 STEAM report

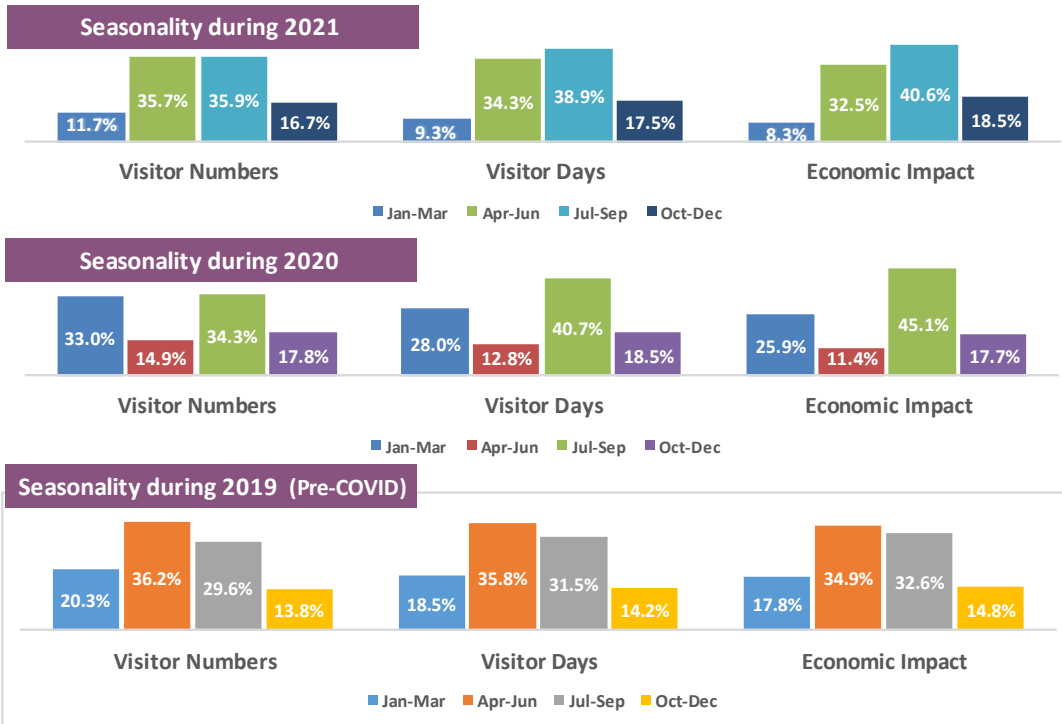
2021 North East Lincolnshire's Visitor Economy



Source: GlobalTourism Solutions (UK) Ltd – NEL's 2021 STEAM report

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

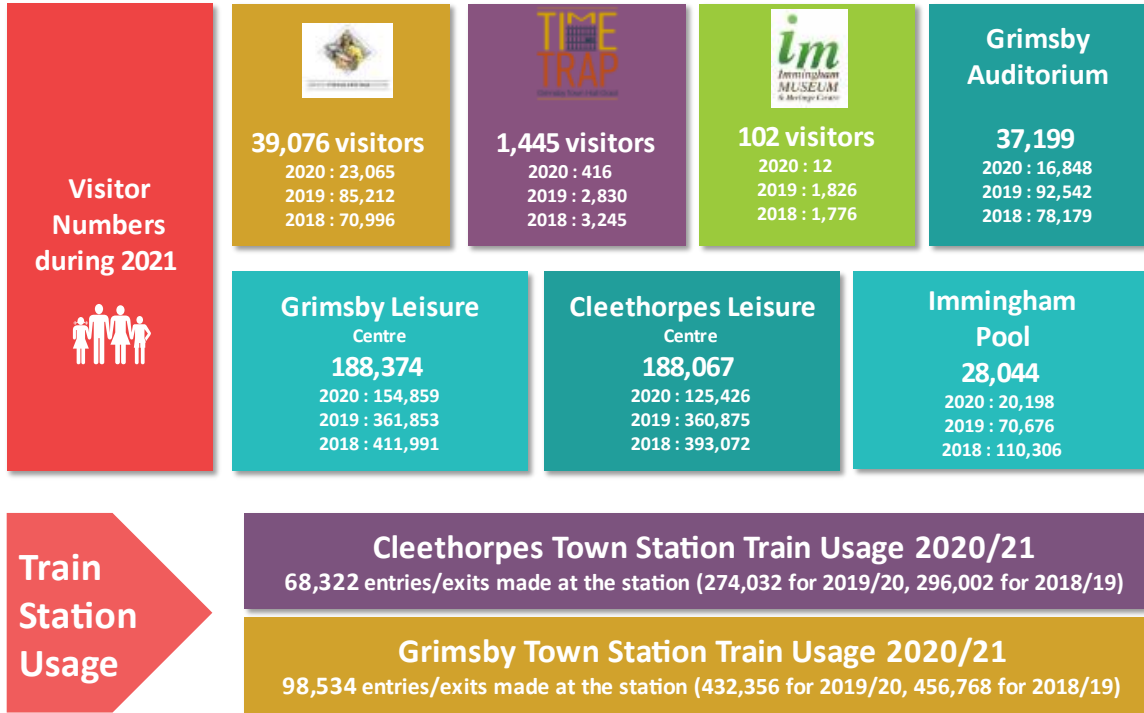
2021 North East Lincolnshire's Visitor Economy



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

Slide 4

North East Lincolnshire's Visitor Economy
2021 TOURISM DASHBOARD



Source: Attractions, Springboard Footfall counters and Rail Data Portal

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North East Lincolnshire's Visitor Economy
2021 FOOTFALL - Cleethorpes



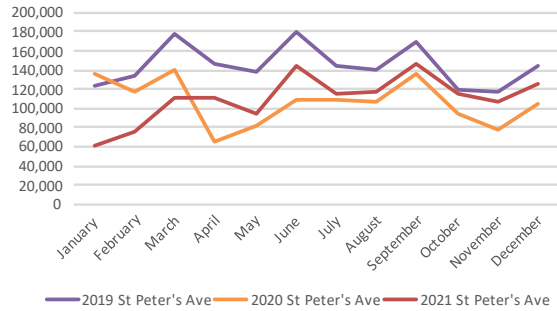
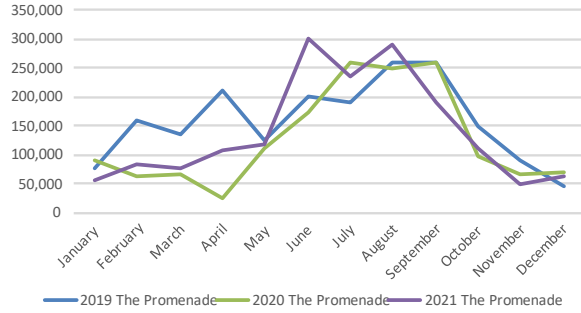
Footfall
2021

**Cleethorpes
The Promenade**
1,691,354

2020 - 1,523,561
2019 - 1,905,128

**Cleethorpes
St Peter's Avenue**
1,324,124

2020 - 1,279,215
2019 - 1,739,152



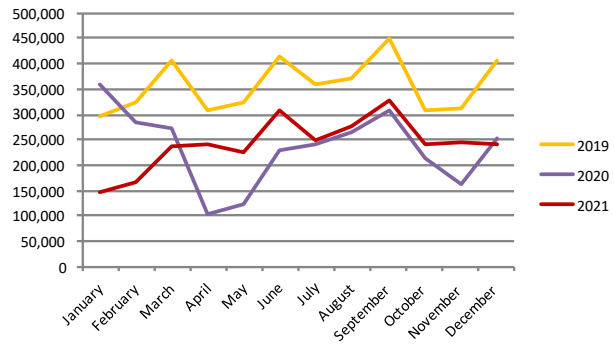
2021 FOOTFALL – Grimsby town centre



Footfall
2021

**Grimsby
Victoria Street
2,909,522**

2020 - 2,863,002
2019 - 4,273,159



**Grimsby
St James Square
566,378***

*part year as this is a new counter installed
August 2020

**Grimsby
Riverhead Square
499,757***

*part year as this is a new counter installed
August 2020

Slide 7

North East Lincolnshire's Visitor Economy 2021 Visitor Feedback



2021 Visitor Feedback



110 visitors
were surveyed
in August 2021

Where were they from?

76% were from outside the area (24% were local residents)
28% were from Yorkshire, 17% from Lincolnshire/Scunthorpe

Sheffield, Derby, Leicester, Doncaster, Chesterfield, Manchester, Lincoln, Scunthorpe, Milton Keynes, Liverpool, Leeds, Lincoln, Yarmouth, Oxford, Nottingham, Scotland, Gainsborough,

Getting here

79% by car
6% by train
3% by bus
5% walked

How long here?

Day trip 45% 2 -3 nights 9%
4-5 nights 5% A week 10%
More than a week 5%
(Locals 22%)

Overnight

Caravan/Camping 14%
Hotel/B&B 6%
[not stated 13%]

Reason for Visiting... The Beach 57% Visiting friends & family 13% On Holiday 10%
Other reasons: Dog walking , Fish & Chips , Walking, the continental market , the arcades

Favourite things were the **BEACH (58%), fish and chips, donkeys, easy access/easy to get to dog friendly, the amenities, family friendly**

What's missing from Cleethorpes?

More toilets 47% More things to do 16% Better signage 4% More bins 5% More parking 15%
More steps to the Beach 6% Nothing! 11%

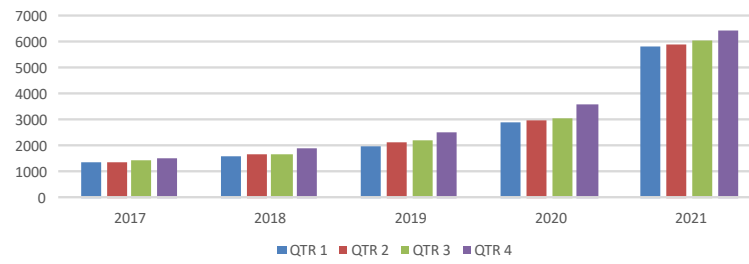
Slide 8

North East Lincolnshire's Visitor Economy 2021 TOURISM DASHBOARD

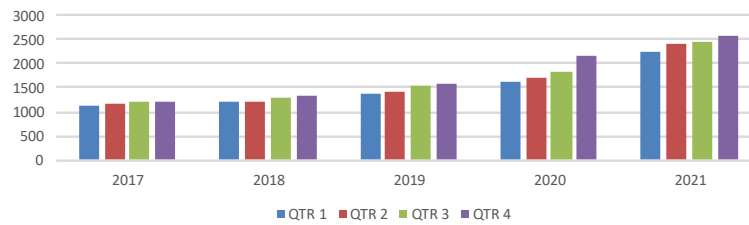


Social Media Stats for Discover North East Lincolnshire

Facebook Follower Growth



Instagram Follower Growth



Source: Social media stats

Slide 9

North East Lincolnshire's Visitor Economy 2021 TOURISM DASHBOARD



Web Stats for 2021

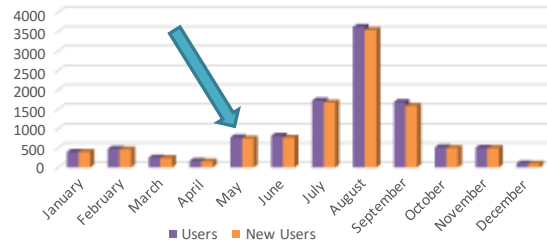
***The new website was launched w/c 23/5/21**

Good growth shown once site was launched

Visitor hits to the site show seasonality (as you would expect for this type of website)

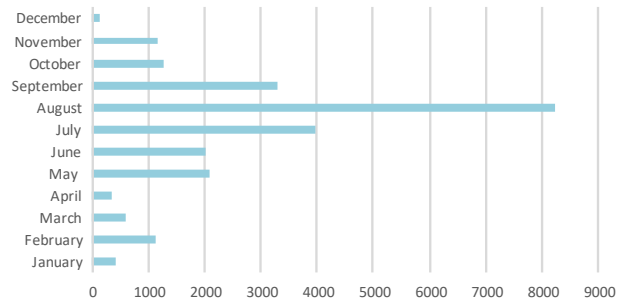
Web Stats 2021

www.discovernortheastlincolnshire.co.uk



Page Views 2021

www.discovernortheastlincolnshire.co.uk



Source: Web Stats