

Appendix A

Lincolnshire Tourism Model 2003

LINCOLNSHIRE TOURISM MODEL 2003
EAST LINDSEY
SUMMARY REPORT

Heart of England Tourism

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April 2005

SECTION ONE:

STAYING VISITORS TO EAST LINDSEY

Tourism stock

Accommodation

The pattern of tourism in Lincolnshire is largely dependent on the distribution of tourism infrastructure in the form of the accommodation stock and its attractions.

	Coastal	Inland	Number in County	Area % of county
Hotels (bedspaces)	5,070	1,143	13,094	47%
Paying guest (bedspaces)	137	289	1,665	26%
Self catering (units)	898	200	1,525	72%
Touring Caravans and tents (pitches)	4,525	1,230	7,720	75%
Static caravans (units)	11,328	403	13,101	90%
Holiday camp (units)	1,425	0	1,425	100%
Group accommodation (bedspaces)	0	113	890	13%
Population	46,387	83851	646,436	20%

Accommodation for visitors is provided on a commercial basis in serviced accommodation such as hotels, guest houses and B&B's, and on a self catering basis in flats, cottages, caravan and camp sites. Group accommodation may also be provided in youth hostels, college accommodation and similar establishments.

Note: Hotels includes guest houses, inns and motels. Paying guest category includes B&B and farmhouse establishments.

Study centres offering language tuition and other short courses for overseas students often do not provide dedicated accommodation, but make use of serviced accommodation and private houses in the locality.

Total capacity in commercial accommodation is estimated at some 25,223 bedspaces, equivalent to 68% of the county's stock.

In addition to the stock of tourism accommodation, many people also choose to stay with friends and relatives. East Lindsey has some 20% of the resident population of the county.

Attractions

The overall attractiveness of any area depends on the quality and uniqueness of the environment. Visitor attractions are an important part of that environment.

The total number of visitors to attractions and events where figures are known amounts to over 9 million, the largest establishments in terms of visitor numbers include:

- Magic World of Fantasy Island (East Lindsey)
- Skegness Natureland Seal
- Skegness Water Park
- Tattershall Castle
- Stockwith Mill
- Alford Five Sailed Windmill

For confidentiality reasons the report cannot show a full breakdown of individual attraction numbers but can only give an indication of collective figures.

STAYING TOURISM BY ACCOMMODATION

TRIPS BY ACCOMMODATION: UK TOURISTS

It is estimated that East Lindsey hosted 1,428,940 domestic tourism trips in 2003, of which over of which over 1 million were by visitors visiting the coastal areas.

- Almost two fifths (39%) of domestic visitors to East Lindsey stay in static caravans
- 6% of domestic visitors stay at holiday camps whilst visiting East Lindsey
- 9% of visitors stay in touring caravans and tents
- Overall visitors staying in self catering and non serviced accommodation account for 67% of total domestic trips to East Lindsey.

	UK Coastal	%	UK Inland	%	Total	%
Hotels	134,510	12%	42,180	14%	176,690	12%
Paying guest	9,660	1%	33,580	11%	43,240	3%
Self catering	141,720	13%	43,740	14%	185,460	13%
Touring caravan & tent	105,800	9%	27,880	9%	133,680	9%
Static caravan	561,360	50%	0	0%	561,360	39%
Holiday Camp	79,600	7%	0	0%	79,600	6%
Group	0	0%	4,700	2%	4,700	*
Other	14,000	1%	25,310	8%	39,310	4%
Staying with friends and relatives	72,980	7%	131,920	43%	204,900	14%
Total	1,119,630		309,310	14%	1,428,940	100%

TRIPS BY ACCOMMODATION OVERSEAS TOURISTS

It is estimated that East Lindsey hosted 30,230 overseas tourism trips in 2003. Almost over half (56%) of overseas visitors to East Lindsey stay with friends or relatives

- Over a fifth (21%) of overseas visitors stay in serviced accommodation whilst in East Lindsey

	Overseas Coastal	%	Overseas Inland	%	Total	%
Hotels	2,980	25%	2,630	14%	5,610	19%
Paying guest	70	1%	640	3%	710	2%
Self catering	240	2%	110	1%	350	1%
Touring caravan & tent	1,060	9%	720	4%	1,780	6%
Group	0	0%	660	4%	660	2%
Other	1,490	13%	2,690	15%	4,180	14%
Staying with friends and relatives	6,030	51%	10,910	59%	16,940	56%
Total	11,870	100%	18,360	100%	30,230	100%

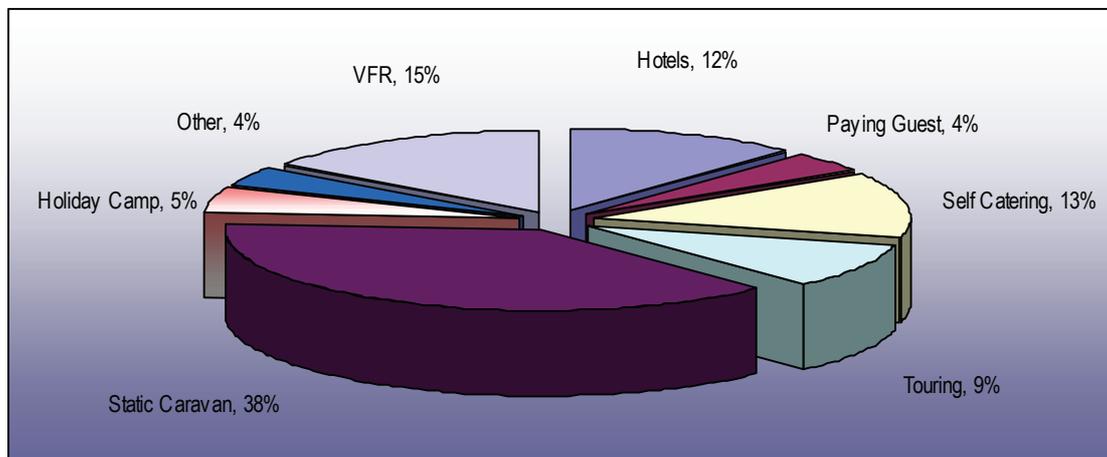
TRIPS BY ACCOMMODATION ALL VISITORS

It is estimated that East Lindsey hosted 1,459,170 tourism trips in 2003, of which over of which over 1 million were by visitors visiting the coastal areas.

- Half (50%) of visitors to East Lindsey stay in static caravans by the coast
- Those visitors staying inland are more likely to stay with friends and relatives (44%)

	All Coastal	%	All Inland	%	Total	%
Hotels	137,490	12%	44,810	14%	182,300	12%
Paying guest	9,730	1%	34,220	10%	43,950	4%
Self catering	141,960	13%	43,850	13%	185,810	13%
Touring caravan & tent	106,860	9%	28,600	9%	135,460	9%
Static caravan	561,360	50%	*	*	561,360	38%
Holiday Camp	79,600	7%	*	*	79,600	5%
Group	*	*	5,360	2%	5,360	*
Other	15,490	0%	28,000	9%	43,490	4%
Staying with friends and relatives	79,010	7%	142,830	44%	221,840	15%
Total	1,131,500	100%	327,670	100%	1,459,170	100%

The chart below shows a breakdown of all trips to East Lindsey by accommodation type.



NIGHTS BY ACCOMMODATION – UK VISITORS

Over 5.5million tourism nights were spent in East Lindsey by UK visitors in 2003, including over 4.5 million nights spent in coastal areas (82%). As with the distribution of trips, static caravans were the main form of accommodation used. Overall:

- Those UK visitors staying in static caravans by the coast spent the most number of nights in East Lindsey (55%)
- Those staying inland spent over two fifths (45%) of nights staying with friends or relatives

	UK Coastal	%	UK Inland	%	Total	%
Hotels	309,080	7%	96,920	10%	406,000	7%
Paying guest	21,390	0%	74,360	7%	95,750	2%
Self catering	722,550	16%	223,010	22%	945,560	17%
Touring caravan & tent	512,130	11%	134,950	14%	647,080	12%
Static caravan	2,508,960	55%	0	0%	2,508,960	45%
Holiday Camp	266,100	6%	0	0%	266,100	5%
Group	0	0%	10,570	1%	10,570	*
Other	38,200	1%	69,070	7%	107,270	2%
Staying with friends and relatives	212,520	5%	384,160	39%	596,680	11%
Total	4,590,930	100%	993,040	100%	5,583,970	100%

NIGHTS BY ACCOMMODATION – OVERSEAS VISITORS

215,550 tourism nights were spent in East Lindsey by overseas visitors in 2003, including over 76,000 overseas tourist nights in coastal areas (36%).

Staying with friends or relatives was by far the most popular form of accommodation in terms of nights for overseas visitors with 71%.

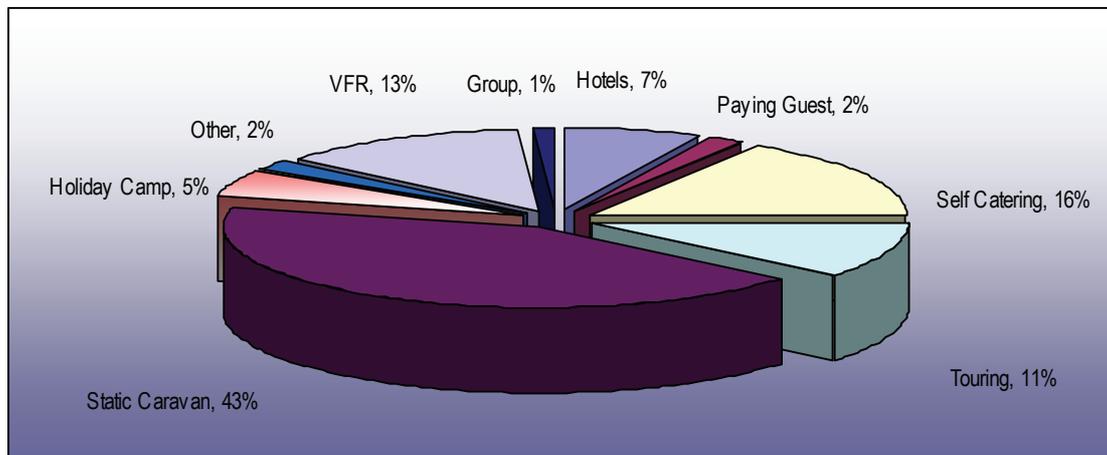
	Overseas Coastal	%	Overseas Inland	%	Total	%
Hotels	7,960	10%	7,030	5%	14,990	7%
Paying guest	280	0%	2,580	2%	2,860	1%
Self catering	3,860	5%	1,770	1%	5,630	3%
Touring caravan & tent	5,300	7%	3,600	3%	8,900	4%
Group	*	*	16,590	12%	16,590	8%
Other	4,380	6%	7,910	6%	12,290	6%
Staying with friends and relatives	54,920	72%	99,370	72%	154,290	71%
Total	76,700	100%	138,850	100%	215,550	100%

NIGHTS BY ACCOMMODATION – ALL VISITORS

Over 5 million tourism nights were spent in East Lindsey by UK visitors in 2003, including over 4 million nights spent in coastal areas (80%). As with the distribution of trips, static caravans were the main form of accommodation used. Overall:

- 54% of nights to coastal areas were spent in static caravan accommodation with only 7% of nights being spent in serviced accommodation
- Inland nights were mostly spent visiting friends and relatives (43%)

	All Coastal	%	All Inland	%	Total	%
Hotels	317,040	7%	103,950	9%	420,990	7%
Paying guest	21,670	0%	76,940	7%	98,610	2%
Self catering	726,410	16%	224,780	20%	951,190	16%
Touring caravan & tent	517,430	11%	138,550	12%	655,980	11%
Static caravan	2,508,960	54%	0	0%	2,508,960	43%
Holiday Camp	266,100	6%	0	0%	266,100	5%
Group	0	0%	27,160	2%	27,160	1%
Other	42,580	1%	76,980	7%	119,560	2%
Staying with friends and relatives	267,440	6%	483,530	43%	750,970	13%
Total	4,667,630	100%	1,131,890	100%	5,799,520	100%



AVERAGE TRIP LENGTH

The average trip length for tourists staying in coastal areas in East Lindsey was 4.13 days overall. Overseas visitors tended to stay for longer periods of time than their UK counterparts in the majority of the main forms of accommodation.

Similar results were seen in inland areas although the average length of stay overall was shorter at 3.45 days. Again, overseas visitors stayed longer than UK visitors.

ALL VISITORS TO COASTAL AREAS

	UK	Overseas	Total
Hotels	2.30	2.67	2.31
Paying guest	2.21	4.00	2.23
Self catering	5.10	16.08	5.12
Touring caravan & tent	4.84	5.00	4.84
Static caravan	4.47	0.00	4.47
Holiday Camp	3.34	0.00	3.34
Other	2.73	2.94	2.75
Staying with friends and relatives	2.91	9.11	3.38
Total	4.10	6.46	4.13

ALL VISITORS TO INLAND AREAS

	UK	Overseas	Total
Hotels	2.30	2.67	2.32
Paying guest	2.21	4.03	2.25
Self catering	5.10	16.09	5.13
Touring caravan & tent	4.84	5.00	4.84
Group	2.25	25.14	5.07
Other	2.73	2.94	2.75
Staying with friends and relatives	2.91	9.11	3.39
Total	3.21	7.56	3.45

SPEND BY ACCOMMODATION

UK VISITORS

Total spend by UK visitors to East Lindsey in 2003 is estimated to be £214million, 79% of which was spent in coastal areas.

Over a third (37%) of UK spend in coastal areas was spent by visitors staying in static caravans, this is in contrast to visitors staying inland where spending was equally divided between those staying in self catering accommodation, those staying in hotels and those visitors staying with friends or relatives.

	All Coastal	%	All Inland	%	Total	%
Hotels	£23,065,000	14%	£7,687,000	17%	£30,752,000	14%
Paying guest	£1,518,000	1%	£5,377,000	12%	£6,895,000	3%
Self catering	£32,252,000	19%	£9,991,000	23%	£42,243,000	20%
Touring caravan & tent	£13,837,000	8%	£3,744,000	8%	£17,581,000	8%
Static caravan	£80,514,000	47%	*	*	£80,514,000	37%
Holiday Camp	£10,000,000	6%	*	*	£10,000,000	5%
Group	*	*	£907,000	2%	£907,000	4%
Other	£2,579,000	2%	£4,663,000	11%	£7,242,000	*
Staying with friends and relatives	£6,561,000	4%	£11,863,000	27%	£18,424,000	9%
Total	£170,326,000	100%	£44,232,000	100%	£214,558,000	100%

OVERSEAS VISITORS

Total spend by overseas visitors in East Lindsey in 2003 is estimated to be £8.6 million.

In contrast to UK visitors the large majority (62%) of overseas spend was spent by visitors staying inland and with friends or relatives (64%).

	All Coastal	%	All Inland	%	Total	%
Hotels	£798,000	24%	£705,000	13%	£1,503,000	17%
Paying guest	£17,000	1%	£159,000	3%	£176,000	2%
Self catering	£246,000	8%	£113,000	2%	£359,000	4%
Touring caravan & tent	£235,000	7%	£160,000	3%	£395,000	5%
Group	*	*	£640,000	12%	£640,000	7%
Other	£77,000	2%	£140,000	3%	£217,000	3%
Staying with friends and relatives	£1,899,000	58%	£3,436,000	64%	£5,335,000	62%
Total	£3,272,000	100%	£5,353,000	100%	£8,625,000	100%

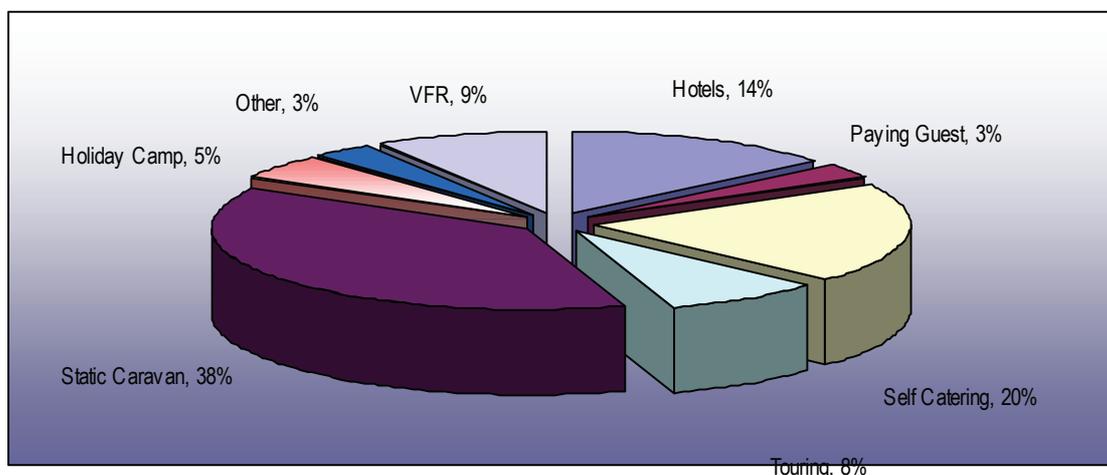
SPEND BY ACCOMMODATION – ALL VISITORS

Total staying tourist spending in East Lindsey in 2003 is estimated at £214.5 million of which £170 million or 79% was contributed by visitors to coastal areas.

Of the total spend:

- 38% was spent by visitors staying in static caravan accommodation
- 20% was spent by people staying in self catering accommodation
- 17% of the total spent in East Lindsey was by people staying in serviced accommodation

	All Coastal	%	All Inland	%	Total	%
Hotels	£23,065,000	14%	£7,687,000	17%	£30,752,000	14%
Paying guest	£1,518,000	1%	£5,377,000	12%	£6,895,000	3%
Self catering	£32,252,000	19%	£9,991,000	23%	£42,243,000	20%
Touring caravan & tent	£13,837,000	8%	£3,744,000	8%	£17,581,000	8%
Static caravan	£80,514,000	47%	£0	0%	£80,514,000	38%
Holiday Camp	£10,000,000	6%	£0	0%	£10,000,000	5%
Group	£0	0%	£907,000	2%	£907,000	*
Other	£2,579,000	2%	£4,663,000	11%	£7,242,000	3%
Staying with friends and relatives	£6,561,000	4%	£11,863,000	27%	£18,424,000	9%
Total	£170,326,000	100%	£44,232,000	100%	£214,558,000	100%



AVERAGE SPEND PER NIGHT

The average amount spent was £37.79 per visitor night.

Those visitors staying in inland areas spent slightly more than those visiting the coast. This is primarily due to the type of accommodation in which they were staying; visitors to inland areas were more likely to stay in serviced accommodation and therefore likely to spend more per night.

	COASTAL	INLAND	OVERALL
Hotels	£72.75	£73.95	£73.35
Paying guest	£70.05	£69.89	£69.97
Self catering	£44.40	£44.45	£44.43
Touring caravan & tent	£26.74	£27.02	£26.88
Static caravan	£32.09	£0.00	£32.09
Other	£60.57	£60.57	£60.57
Staying with friends and relatives	£24.53	£24.53	£24.53
Total	£36.49	£39.08	£37.79

STAYING TOURISM BY PURPOSE

TRIPS BY PURPOSE – UK VISITORS

Of the total trips taken, holiday trips accounted for the majority (87%), most of which (78%) were taken in coastal areas.

	Inland	%	Coastal	%	Total	%
Holidays	192,330	62%	1,048,340	94%	1,240,670	87%
Business	41,120	13%	29,330	3%	70,450	5%
Visits to friends and relatives	73,980	24%	40,920	4%	114,900	8%
Other purposes: Excl Lang	1,880	1%	1,040	0%	2,920	*
Total	309,310	100%	1,119,630	100%	1,428,940	100%

TRIPS BY PURPOSE – OVERSEAS VISITORS

For over two fifths (43%) of overseas visitors visiting friends or relatives was the main purpose of their trip followed by over a third (38%) on business.

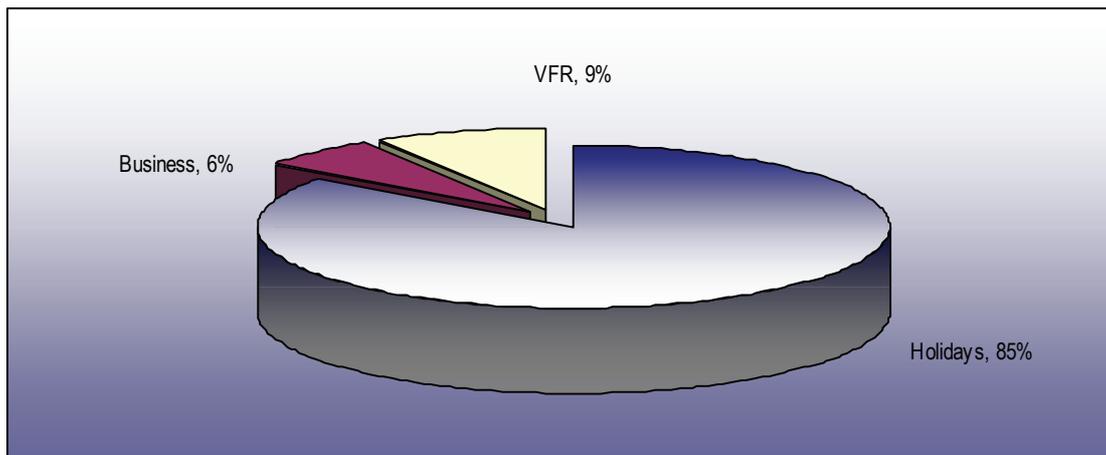
	Inland	%	Coastal	%	Total	%
Holidays	2,470	13%	2,090	18%	4,560	15%
Business	6,660	36%	4,750	40%	11,410	38%
Visits to friends and relatives	8,380	46%	4,640	39%	13,020	43%
Other purposes: Excl Lang	700	4%	390	3%	1,090	4%
Other: Language Schools	150	1%	0	*	150	*
Total	18,360	100%	11,870	100%	30,230	100%

TRIPS BY PURPOSE – ALL VISITORS

Of the total trips taken, holiday trips accounted for the majority (85%) followed by social/personal visits to friends and relatives and business accounting for the remainder of trips.

Coastal areas overall saw the majority of trips undertaken overall (78%) and the majority of these were for holiday purposes (93%).

	Inland	%	Coastal	%	Total	%
Holidays	194,800	59%	1,050,430	93%	1,245,230	85%
Business	47,780	15%	34,080	3%	81,860	6%
Visits to friends and relatives	82,360	25%	45,560	4%	127,920	9%
Other	2,580	1%	1,430	0%	4,010	*
Total	327,670	100%	1,131,500	100%	1,459,020	100%



NIGHTS BY PURPOSE

UK VISITORS

In terms of nights, holidays accounted for the large majority (91%) of the total spent by UK visitors with most being taken by the coast (82%).

Visitors were more likely to visit friends or relatives in more inland areas (24%).

	Inland	%	Coastal	%	Total	%
Holidays	666,700	67%	4,396,450	96%	5,063,150	91%
Business	87,240	9%	62,230	1%	149,470	3%
Visits to friends and relatives	233,870	24%	129,360	3%	363,230	7%
Other purposes: Excl Lang	5,230	1%	2,890	0%	8,120	*
Total	993,040	100%	4,590,930	100%	5,583,970	100%

OVERSEAS VISITORS

In terms of overseas nights, visits to friends or relatives accounted for over half (54%) of all nights and holidays for a fifth (20%).

Inland areas accounted for slightly more holiday visits (21%) than coastal areas (19%).

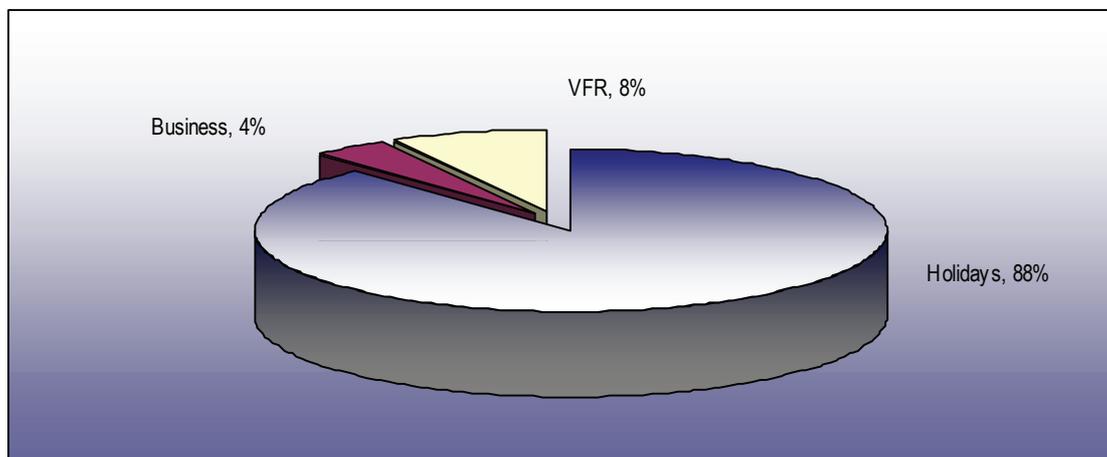
	Inland	%	Coastal	%	Total	%
Holidays	28,950	21%	14,700	19%	43,650	20%
Business	21,680	16%	15,460	20%	37,140	17%
Visits to friends and relatives	75,200	54%	41,640	54%	116,840	54%
Other purposes: Excl Lang	8,790	6%	4,900	6%	13,690	6%
Other: Language Schools	4,230	3%	*	*	4,230	2%
Total	138,850	100%	76,700	100%	215,550	100%

NIGHTS BY PURPOSE - ALL VISITORS

The majority of nights spent overall in East Lindsey were for holiday purposes (88%) to coastal areas (95%).

Again, visiting friends and relatives accounted for more nights in inland areas (27%) than in coastal areas (4%).

	Inland	%	Coastal	%	Total	%
Holidays	695,650	61%	4,411,150	95%	5,106,800	88%
Business	108,920	10%	77,690	2%	186,610	4%
Visits to friends and relatives	309,070	27%	171,000	4%	480,070	8%
Other purposes: Excl Lang	14,020	1%	7,790	0%	21,810	*
Other: Language Schools	4,230	0%	0	0%	4,230	*
Total	1,131,890	100%	4,667,630	100%	5,799,520	100%



SPEND BY PURPOSE

UK VISITORS

UK visitors spent approximately £205.9 million whilst in East Lindsey.

Because the largest proportion of trips overall were for the purpose of holidays it is unsurprising to find that the largest proportion of spend (90%) by UK visitors was also on holidays in East Lindsey.

Coastal areas saw the main bulk of UK spend with approximately £167 million or 81% of the total spend.

	Inland	%	Coastal	%	Total	%
Holidays	£26,927,000	69%	£159,349,000	95%	£186,276,000	90%
Business	£6,829,000	18%	£4,871,000	3%	£11,700,000	6%
Visits to friends and relatives	£4,845,000	12%	£2,680,000	2%	£7,525,000	4%
Other purposes: Excl Lang	£278,000	1%	£154,000	0%	£432,000	*
Total	£38,879,000	100%	£167,054,000	100%	£205,933,000	100%

OVERSEAS VISITORS

Overseas visitors in contrast were more likely to spend more in inland areas of East Lindsey (62% compared to 38% in coastal areas) this is mainly due to the number of visits to friends and relatives that was witnessed inland.

	Inland	%	Coastal	%	Total	%
Holidays	£652,000	12%	£390,000	12%	£1,042,000	12%
Business	£2,334,000	44%	£1,664,000	51%	£3,998,000	46%
Visits to friends and relatives	£1,980,000	37%	£1,096,000	33%	£3,076,000	36%
Other purposes: Excl Lang	£218,000	4%	£122,000	4%	£340,000	4%
Other: Language Schools	£169,000	3%	£0	0%	£169,000	2%
Total	£5,353,000	100%	£3,272,000	100%	£8,625,000	100%

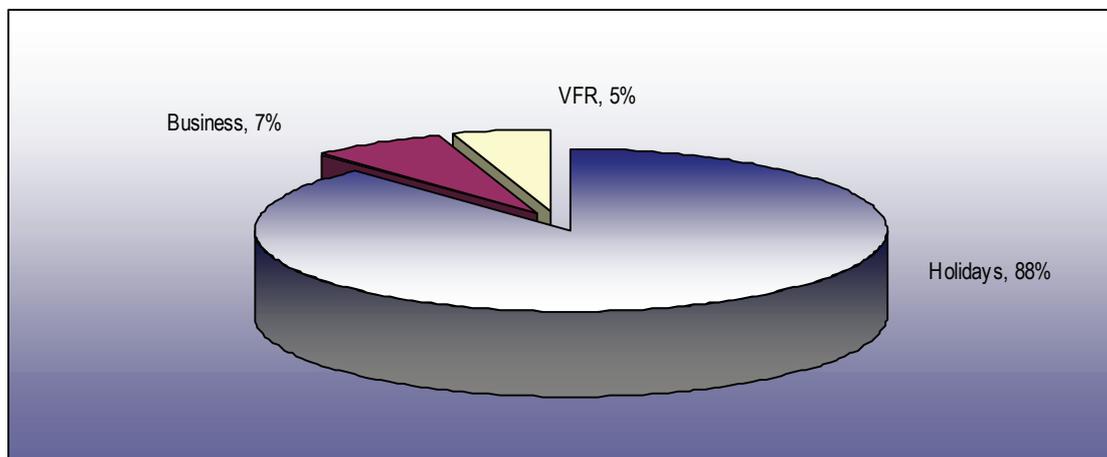
SPEND BY PURPOSE – ALL VISITORS

Overall the main purpose of spend by visitors to East Lindsey was for holidays (88%) followed by much smaller proportions on business purposes and visits to friends or relatives.

Visitors to Coastal areas spent more than those to inland areas in 2003 (£170.3 million compared with £44.2 million).

	Inland	%	Coastal	%	Total	%
Holidays	£27,579,000	62%	£159,739,000	94%	£187,318,000	88%
Business	£9,163,000	21%	£6,535,000	4%	£15,698,000	7%
Visits to friends and relatives	£6,825,000	15%	£3,776,000	2%	£10,601,000	5%
Other purposes: Excl Lang	£496,000	1%	£276,000	0%	£722,000	*
Other: Language Schools	£169,000	0%	£0	0%	£169,000	*
Total	£44,232,000	100%	£170,326,000	100%	£214,558,000	100%

The chart below shows the overall breakdown of spend by purpose in East Lindsey clearly showing the larger proportion of spend for holiday purposes.



AVERAGE TRIP LENGTH

COASTAL AREAS

Holiday trips generally had a slightly longer trip length at 4.20 nights than the average (4.13).

Overseas trips (6.46) are estimated to be slightly longer than those by UK visitors (4.10). Overseas trips may well include some study trips as well as multi-purpose trips and therefore will include students staying for more than a few weeks at a time.

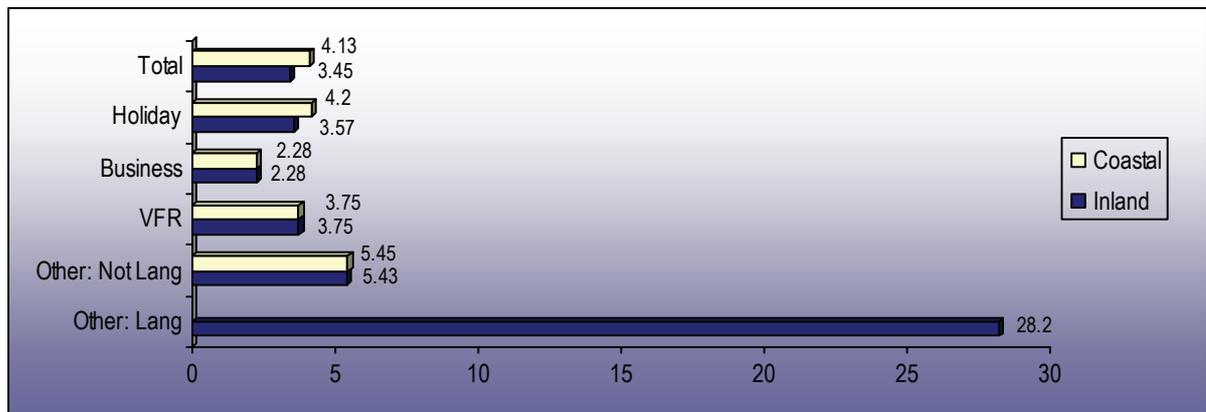
	UK tourists	Overseas visitors	Overall
Holidays	4.19	7.03	4.20
Business	2.12	3.25	2.28
Visits to friends and relatives	3.16	8.97	3.75
Other purposes: Excl Lang	2.78	12.56	5.45
Total	4.10	6.46	4.13

INLAND AREAS

Again holiday trips generally had a longer trip length at 3.57 nights than the average (3.45).

Similarly to visits to coastal areas overseas visitors had a longer length of stay (7.56) than UK tourists (3.21) this was the case in every category.

	UK tourists	Overseas visitors	Overall
Holidays	3.47	11.72	3.57
Business	2.12	3.26	2.28
Visits to friends and relatives	3.16	8.97	3.75
Other purposes: Excl Lang	2.78	12.56	5.43
Other: Language Schools	0.00	28.20	28.20
Total	3.21	7.56	3.45



AVERAGE SPEND PER NIGHT

COASTAL AREAS

The average spent per night for business trips at £84.12 was over twice the average spent per trip overall of £36.49.

Visits to friends and relatives recorded the lowest spend per night (£22.08) reflecting the omission of spending on accommodation.

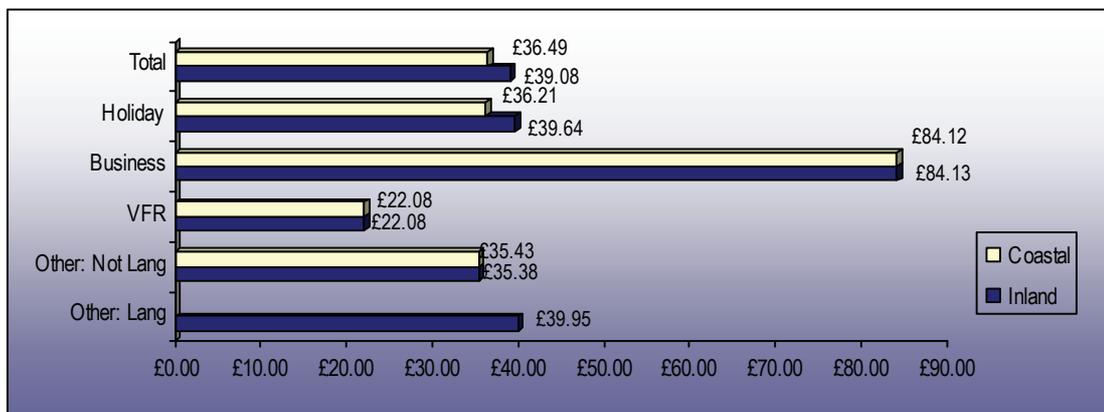
	UK tourists	Overseas visitors	Overall
Holidays	£36.24	£26.53	£36.21
Business	£78.27	£107.63	£84.12
Visits to friends and relatives	£20.72	£26.32	£22.08
Other: Excl Lang	£53.29	£24.90	£35.43
Total	£36.39	£42.66	£36.49

INLAND AREAS

The average spent per night for business trips at £84.13 was again over twice the average spent per trip overall of £39.08.

Visits to friends and relatives recorded the lowest spend per night (£22.08) reflecting the omission of spending on accommodation.

	UK tourists	Overseas visitors	Overall
Holidays	£40.39	£22.52	£39.64
Business	£78.28	£107.66	£84.13
Visits to friends and relatives	£20.72	£26.33	£22.08
Other: Excl Lang	£53.15	£24.80	£35.38
Other Lang	£0.00	£39.95	£39.95
Total	£39.15	£38.55	£39.08



SECTION TWO:

DAY VISITOR TRIPS TO EAST LINDSEY

DAY VISITORS

Information on day visitor activity is available at regional level from the United Kingdom Day Visits Survey (UKDVS). Trips to East Lindsey have been estimated on the basis of the visits to tourist attractions in the District, together with the relative attractiveness and area of countryside, which is presumed to affect the volume of day trips to the countryside, and of the range of shops and entertainment facilities available in the town.

The estimates should be treated with caution given the lack of detailed supporting survey information within the county.

ALL LEISURE TRIPS

A distinction is made in the UKDVS between all leisure day trips from home and tourism day trips. All leisure day trips include local trips for such everyday activity as taking the dog for a walk, going out for a drink or meal and/or visits to the cinema or theatre as well as longer trips outside the area.

The total number of leisure day trips in the District is estimated at approximately 26 million, with associated spending of around £347.7 million. The bulk of these trips and spend will be by local residents.

The average spend per trip is estimated at approximately £13.36, with town trips having a higher spend figure of £16.80 and countryside trips lower at £9.14. Coastal trips are thought to have an average of approximately £13.29.

All leisure trips to	Trips	Spend
Coast	11,780,000	£156,563,170
Town	7,961,881	£133,759,601
Countryside	6,278,000	£57,384,282
All	26,020,000	£347,707,053

TOURISM DAY TRIPS

Tourism day trips are defined by the Department of Culture, Media and Sport as those day trips from home which are taken on an irregular basis and have a duration of 3 hours or more.

Using this definition, **it is estimated that there were 8 million tourism day trips with associated spending of some £233 million in 2003.** Town trips outnumbered countryside trips by three to one. Spending was divided roughly six to one between town and countryside trips. The majority of tourism day trips are likely to originate outside the district (and county).

Average spend per trip is estimated at £26.53, with tourism town trips spending on average £38.29 and tourism countryside trips around £26.32.

Tourism day trips to	Trips	Spend
Coast	4,893,665	£112,015,991
Town	1,554,996	£59,540,806
Countryside	2,349,761	£61,845,701
All	8,798,422	£233,402,498

SECTION THREE:

SEASONALITY OF TRIPS TO EAST LINDSEY

SEASONALITY OF COASTAL VISITS

The seasonal pattern of staying tourist trips has been estimated from the seasonal distribution of trips undertaken for different purposes. Almost a third (31%) of all trips are taken in the summer season/shoulder season, with a peak in August. Secondary peaks occur in December and April popular months for visits to friends and relatives around Christmas and Easter time.

	UK tourists	Overseas tourists	All staying tourist trips	%
January	48,265	861	49,126	4%
February	84,953	695	85,648	8%
March	64,577	819	65,396	6%
April	104,604	880	105,484	9%
May	103,999	876	104,875	9%
June	83,368	1,161	84,529	7%
July	124,678	1,243	125,921	11%
August	147,298	1,328	148,627	13%
September	105,136	1,047	106,183	9%
October	85,391	1,042	86,433	8%
November	62,881	966	63,847	6%
December	104,419	952	105,372	9%

The seasonal pattern of visitor days is similar to that of trips, although the more even distribution of tourism day trips tends to flatten the curve outside the summer season.

Please see table overleaf for a breakdown of seasonal trips by overnight and day visitors.

	Staying tourist days				Tourism day visits	All visitor days	%
	UK tourists	Overseas tourists	All tourists	%			
January	93,809	5,561	99,371	1%	434,445	533,816	5%
February	254,232	4,488	258,720	3%	262,354	521,073	5%
March	253,185	5,291	258,477	3%	509,376	767,852	8%
April	501,402	5,689	507,091	5%	189,723	696,814	7%
May	415,073	5,658	420,731	5%	190,490	611,221	6%
June	331,762	7,501	339,263	4%	723,434	1,062,697	11%
July	605,228	8,032	613,260	7%	874,828	1,488,088	15%
August	768,030	8,584	776,614	8%	804,497	1,581,112	16%
September	498,733	6,766	505,499	5%	575,107	1,080,606	11%
October	310,363	6,735	317,098	3%	188,956	506,054	5%
November	195,336	6,241	201,577	2%	193,556	395,133	4%
December	363,579	6,154	369,733	4%	454,376	824,109	8%

The peak of visits to coastal areas of East Lindsey was in August with 1,581,112 visitors this equates to 51,004 visitors per day during that month.

SEASONALITY OF INLAND VISITS

The seasonal pattern of staying tourist trips has been estimated from the seasonal distribution of trips undertaken for different purposes.

The pattern of trips throughout the year is similar to that of coastal visits although slightly more trips are taken to inland areas during the winter months.

	UK tourists	Overseas tourists	All staying tourist trips	%
January	20,734	1,331	22,065	7%
February	23,990	1,074	25,064	8%
March	19,652	1,267	20,919	6%
April	27,754	1,362	29,116	9%
May	26,506	1,354	27,861	9%
June	21,445	1,796	23,241	7%
July	31,998	1,923	33,921	10%
August	40,535	2,055	42,590	13%
September	27,907	1,620	29,527	9%
October	24,341	1,612	25,953	8%
November	16,836	1,494	18,330	6%
December	27,528	1,473	29,001	9%

The seasonal pattern of visitor days is similar to that of trips, although the more even distribution of tourism day trips tends to flatten the curve outside the summer season.

Please see table overleaf for a breakdown of seasonal trips by overnight and day visitors.

	Staying tourist days				Tourism day visits	All visitor days	%
	UK tourists	Overseas tourists	All tourists	%			
January	33,189	10,068	43,257	2%	233,311	276,567	6%
February	57,624	8,124	65,748	3%	148,033	213,781	5%
March	56,515	9,579	66,094	3%	331,776	397,870	9%
April	105,512	10,298	115,810	5%	212,536	328,346	7%
May	82,336	10,242	92,578	4%	236,733	329,311	7%
June	65,701	13,579	79,280	4%	423,970	503,250	11%
July	115,946	14,540	130,487	6%	386,872	517,359	11%
August	188,250	15,540	203,790	9%	388,404	592,194	13%
September	98,211	12,248	110,459	5%	298,029	408,487	9%
October	68,989	12,192	81,181	4%	188,338	269,519	6%
November	41,741	11,298	53,039	2%	152,772	205,811	5%
December	78,646	11,141	89,787	4%	410,568	500,354	11%

The peak of visits to inland areas in East Lindsey was again in August with 592,194 visitors this equates to 19,103 visitors per day.

SECTION FOUR:

ECONOMIC IMPACT:

VISITOR EXPENDITURE

JOBS CREATED

BUSINESS TURNOVER

ECONOMIC IMPACT

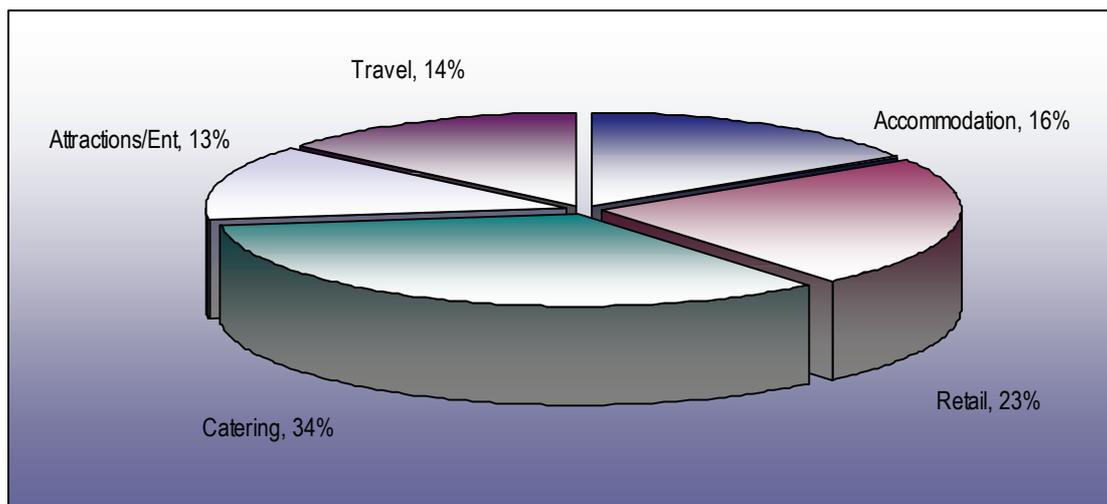
Visitor expenditure – Coastal Areas

The total visitor spend in coastal areas of East Lindsey is estimated to be over £301million, of which staying tourists contribute £170 million and tourism day visitors £131.4 million. This expenditure falls into five main sectors, namely:

- Catering with an estimated £102.7 million
- Retail attracting £68.3 million
- Accommodation with £47.1 million
- Travel with £44 million
- Attractions and entertainment £39 million

£000	Accommodation	Retailing	Catering	Attractions/ entertainment	Travel	Total
UK tourists	£46,025,649	£37,709,300	£42,779,784	£17,086,461	£23,452,806	£167,054,000
Overseas tourists	£1,114,164	£770,138	£719,342	£332,212	£336,144	£3,272,000
Tourism day visitors	£0	£29,830,151	£59,299,062	£22,032,559	£20,285,545	£131,447,318
Total	£47,139,813	£68,309,589	£102,798,189	£39,451,232	£44,074,495	£301,773,318
%	16%	23%	34%	13%	14%	100%

The chart below shows a breakdown of total visitor expenditure in coastal areas of East Lindsey.



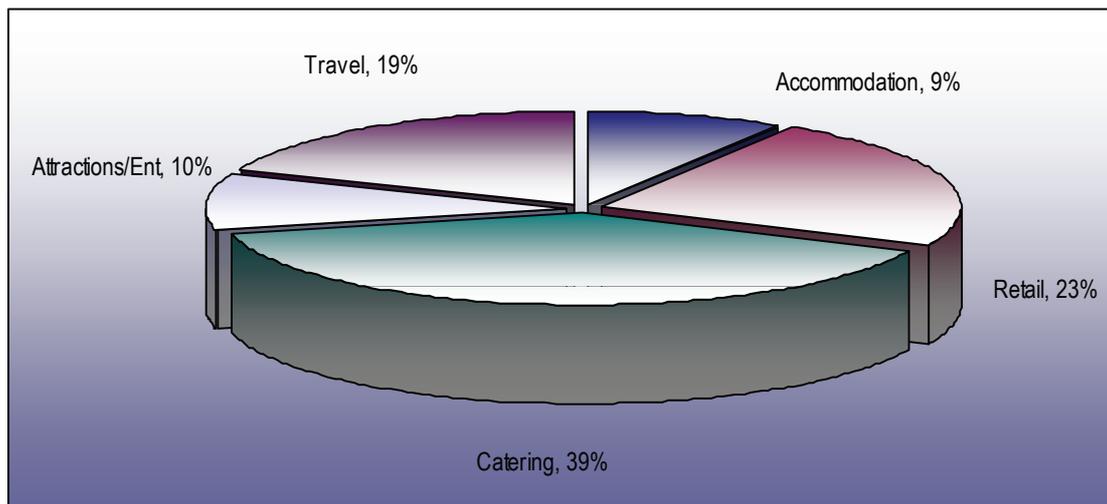
Visitor expenditure – Inland Areas

The total visitor spend in inland areas of East Lindsey is estimated to be over £146million, of which staying tourists contribute £43 million and tourism day visitors £102.4 million. This expenditure falls into five main sectors, namely:

- Catering with an estimated £58.3million
- Retail attracting £33 million
- Travel with £27 million
- Attractions and entertainment £15 million
- Accommodation with £12.6 million

£000	Accommodation	Retailing	Catering	Attractions/ entertainment	Travel	Total
UK tourists	£10,943,375	£7,730,115	£9,922,782	£3,980,500	£6,302,228	£38,879,000
Overseas tourists	£1,729,178	£1,326,759	£1,176,618	£575,435	£545,010	£5,353,000
Tourism day visitors	£0	£24,098,641	£47,217,969	£10,475,773	£20,701,290	£102,493,673
Total	£12,672,553	£33,155,515	£58,317,369	£15,031,708	£27,548,528	£146,725,673
%	9%	23%	39%	10%	19%	100%

The chart below shows a breakdown of total visitor expenditure in inland areas of East Lindsey.



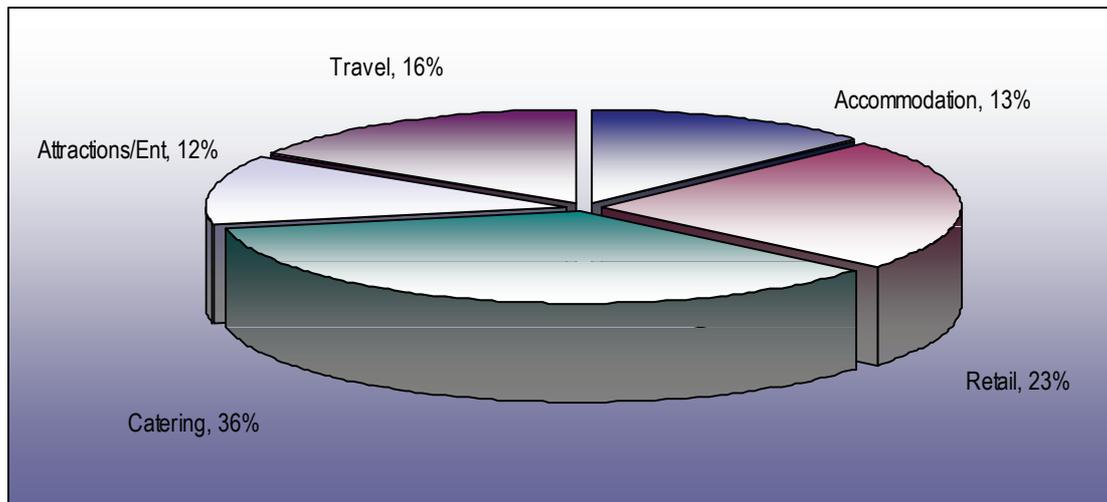
Visitor expenditure – All Visitors

The total visitor spend in East Lindsey is estimated to be over £448 million, of which staying tourists contribute £214.5 million and tourism day visitors £233.9 million. This expenditure falls into five main sectors, namely:

- Catering with an estimated £161.1million
- Retail attracting £101.4million
- Travel with £71.6 million
- Accommodation with £59.8 million
- Attractions and entertainment £54.4 million

£000	Accommodation	Retailing	Catering	Attractions/ entertainment	Travel	Total
UK tourists	£56,969,023	£45,439,415	£52,702,566	£21,066,961	£29,755,034	£205,933,000
Overseas tourists	£2,843,342	£2,096,897	£1,895,960	£907,647	£881,154	£8,625,000
Tourism day visitors	£0	£53,928,792	£106,517,032	£32,508,331	£40,986,835	£233,940,991
Total	£59,812,365	£101,465,104	£161,115,558	£54,482,940	£71,623,023	£448,498,991
%	13%	23%	36%	12%	16%	100%

The chart below shows a breakdown of total visitor expenditure East Lindsey.



BUSINESS TURNOVER

Visitor expenditure adds to the turnover in tourism related businesses in direct receipt of tourism spending. Thus spending on accommodation will mainly benefit hotels, guest houses, caravan and camp sites and other commercial establishments. However, some spending on shopping takes place in attractions, while a proportion of eating and drinking takes place in hotels and pubs which fall within the accommodation sector and at attractions. Some loss of spending also occurs in relation to travel in that a proportion of the visitor spending occurs at the origin of the trip or en route rather than at the destination, as for instance the purchase of train or bus tickets.

Tourism related businesses in turn spend money on the purchase of supplies and services. In so far as these supply businesses are within the District then additional business turnover is created. The total business turnover generated in East Lindsey is estimated to be approximately **£524 million**, excluding any additional business income arising from induced effects arising from employee spending.

Business Turnover – Coastal Areas

	Business turnover	Local business spend on supplies	Total direct and supply spend
Shops	£67,626,500	£6,762,600	£74,389,100
Restaurants/pubs	£96,630,300	£28,989,100	£125,619,400
Attractions/entertainment	£41,162,300	£10,290,600	£51,452,900
Garages/transport	£26,444,700	£661,100	£27,105,800
Accommodation	£52,279,700	£26,139,900	£78,419,600
Total	£284,143,500	£72,843,300	£356,986,800

Business Turnover – Inland Areas

	Business turnover	Local business spend on supplies	Total direct and supply spend
Shops	£32,824,000	£3,282,400	£36,106,400
Restaurants/pubs	£54,818,300	£16,445,500	£71,263,800
Attractions/entertainment	£15,946,400	£3,986,600	£19,933,000
Garages/transport	£16,529,100	£413,200	£16,942,300
Accommodation	£15,588,400	£7,794,200	£23,382,600
Total	£135,706,200	£31,921,900	£167,628,100

Business Turnover – ALL

	Business turnover	Local business spend on supplies	Total direct and supply spend
Shops	£100,450,500	£10,045,000	£110,495,500
Restaurants/pubs	£151,448,600	£45,434,600	£268,147,000
Attractions/entertainment	£57,108,700	£14,277,200	£71,385,900
Garages/transport	£42,973,800	£1,074,300	£44,048,100
Accommodation	£67,868,100	£33,934,100	£101,802,200
Total	£419,849,700	£104,765,200	£524,614,900

Direct employment impacts

Part of the turnover in tourism related businesses is taken up by the cost of employing staff. The wage cost element of visitor stimulated turnover is estimated to be around £115 million.

This expenditure supports jobs directly in the tourism related businesses. The wage levels vary between the different sectors, and some adjustment has also been built in to take account of the general level of wages within the District.¹ The number of full time equivalent jobs supported in tourism related businesses is estimated 7,377. Taking account of part time and seasonal working, the number of actual jobs is estimated to be 10,880.

	Wage costs	Full time equivalent employment	Estimated actual employment
Shops	£21,094,600	1,226	1,839
Restaurants/pubs	£45,434,600	2,987	4,481
Attractions/entertainment	£18,274,800	1,349	1,901
Garages/transport	£8,594,800	404	569
Accommodation	£22,396,500	1,412	2,090
Total	£115,795,200	7,377	10,880

In **coastal areas** the wage cost is estimated to be approximately £78.9 million with full time equivalent jobs at 5,039 and actual employment 7,428.

Inland areas saw slightly lower figures with wage costs estimated to be approximately £36.8 million. 2,338 full time equivalent jobs were created in inland areas and 3,453 actual jobs.

¹ See Appendix B.

Supply and income employment effects

In addition to the employment arising in tourism related businesses, further jobs will be supported in supply businesses. Furthermore, a proportion of the income enjoyed by employees in tourism supported jobs in turn will also generate additional business turnover across a range of sectors, primarily in the service industry.

It is estimated that 3,168 full time equivalent jobs arise locally from these multiplier effects, which after taking account of part time and seasonal working will translate into 3,612 actual jobs.

COASTAL AREAS

Generated by	Full time equivalent jobs	Estimated actual jobs
Business spending on local purchases of supplies and services	1,539	1,755
Spending by employees in direct and supply jobs supported by visitor spending	658	750
Total supply and income jobs	2,197	2,505

INLAND AREAS

Generated by	Full time equivalent jobs	Estimated actual jobs
Business spending on local purchases of supplies and services	670	764
Spending by employees in direct and supply jobs supported by visitor spending	301	343
Total supply and income jobs	971	1,107

ALL

Generated by	Full time equivalent jobs	Estimated actual jobs
Business spending on local purchases of supplies and services	2,209	2,519
Spending by employees in direct and supply jobs supported by visitor spending	959	1,093
Total supply and income jobs⁸	3,168	3,612

TOTAL EMPLOYMENT IN EAST LINDSEY

The total employment supported by visitor spending directly and indirectly is estimated at 10,545 full time equivalents, or 14,492 actual jobs.

It should be noted that additional construction employment will arise as a result of capital spending in improving existing establishments and/or investing in new capacity. There are also further jobs arising in the public sector concerned with marketing or managing visitors in the District. No estimates relating to such additional employment has been included in the above figures.

Estimated income effects

Wages and salaries received by employees and owners of tourism related businesses, supply businesses and services benefiting from employee spending all contribute to the income of people living in East Lindsey.

	FTE jobs	Estimated wages
Direct employment in tourism related businesses	7,377	£100,691,000
Indirect employment in local supply and service businesses	2,209	£45,952,000
Induced employment by tourism employees wage expenditure	959	£19,939,000
Total	10,545	£166,582,000

Summary of Findings – East Lindsey

The key volume and value results for East Lindsey are derived from the various sources as described throughout the report. These include regional and county breakdowns from national level data (United Kingdom Tourism Survey and International Passenger Survey) as well as jobs and income information such as the New Earnings Survey.

At a local level, the occupancy survey provides accurate local occupancy levels and known accommodation stock.

The key results of the Local Area Economic Impact Assessment for 2003 are:

- **10.3 million visitors** came to East Lindsey – 8.8 million as day trippers, and approximately 1.5 million overnight visitors
- The overnight visitors spent a total of 6 million nights in the area.
- During their visit to East Lindsey tourists spent a total of £447.9 million. On average, about £37.3 million is spent in the local economy each month.
- Visitors staying overnight, spent £214.5 million in the area, compared with £233.4 million from those on an irregular day trip.

Appendices

A MODEL DESCRIPTION

This report sets out the estimates of tourism activity in Lincolnshire based on the customised Cambridge Model. The model has been modified in discussion with the tourism officers in the County, and has been used to generate estimates for all the District Council areas in Lincolnshire together with a number of discrete areas including the Objective 5(b), Objective 2, Objective 2 transitional, Lincolnshire RDP, KONVER, Fens, Wolds and Greater Lincoln areas.

The following sources of information have been used in running the model:

- United Kingdom Tourism Survey (UKTS) data at county level for Lincolnshire for 2001, 2002 and 2003
- International Passenger Survey (IPS) data at county level for Lincolnshire for 2001, 2002 and 2003
- United Kingdom Leisure Day Visits Survey (UKDVS) data for the East Midlands Region for 2001
- Heart of England Tourism TRIPS database for known accommodation, modified by additional information from the local authorities
- Heart of England Tourism and local authority data on attractions and visits to attractions
- United Kingdom Occupancy Survey

In addition, information has been drawn from the Census of Employment, Local Authority population estimates and the New Earnings Survey for 2003.

The model approach has involved the following steps:

- Staying tourism demand by accommodation type and by purpose has been derived from the average for 2001-2003 from the UKTS and IPS surveys, with spending at 2003 values
- The identified demand has been distributed as per the distribution of accommodation capacity and population between the different Districts. The distribution has been modified using data from the Lincolnshire Accommodation Survey to take account of relative differences between the individual Districts and the County average in respect of occupancy of different types of accommodation, of overseas visitor use of accommodation and of business use of hotels and serviced accommodation. The assumptions used are set out in Appendix B
- Overall leisure day visits and tourism day visits for Lincolnshire have been estimated using the Cambridge Model day visits template for the East Midlands. The day visits template was modified to take account of the relative distance from major population concentrations in the Region and the relative attractiveness of Lincolnshire countryside against competing areas in the Region. The estimated day visits by type in Lincolnshire have then been distributed within the County using a number of drivers including:
 - The number of visits to attractions in towns, countryside and coast, together with a limited number of events of regional significance. It is assumed that half of visitors to attractions in towns and in the countryside, and a quarter of visitors to attractions at the coast, are tourism day visitors. The remaining visitors to attractions are assumed to be local residents or tourists staying away from home
 - Employment in retailing and entertainment in each of the Districts derived from the Census of Employment with regard to the distribution of tourism town trips

- A countryside index reflecting the area of countryside in each District modified to reflect the assumed greater attractiveness of the Area of Outstanding Natural Beauty, and the reduced attraction of the intensively farmed fenland areas in East Lindsey and South Holland
- A coastal index based on the length of coast line in each District, but with the coastline in East Lindsey and South Holland Districts being heavily discounted because of the relative limited access and attractiveness
- The estimated expenditure derived from the different types of visitor has then been broken down into different spending sectors using data from the three national surveys
- The effects of that spending in each sector is derived from estimates of the turnover arising as a result of visitor expenditure in each of five main receiving sectors, namely retailing, catering, attractions/entertainment, travel and accommodation
- Estimates of direct jobs generated in each sector have then been made on the basis of the average wage cost in each sector and the average proportion of turnover absorbed by wage costs. The latter have been varied for each District on the basis of differences in average earning for each District
- Indirect jobs arising in local suppliers and services have been estimated assuming that additional turnover of £50,000 in such suppliers will support an additional full time job. The proportion of local spending in each sector is modified to take account of differences in the local economy reflecting urban, resort and rural areas
- Induced jobs have been estimated on the basis of multipliers varying from 1.05 for rural areas to 1.15 for urban areas
- Full time equivalent jobs (FTE) have been converted to estimated actual jobs using data from the Cambridge Model (based on business surveys in different areas) with regard to ratio between actual and FTE jobs in each sector taking account of part time and seasonal employment characteristics

Any estimates of tourism activity whether derived from surveys or models should be treated with caution given the transient nature of tourism and the difficulty of accurately measuring what is a dynamic and changing activity. Although the data used in the Model is believed to be relatively robust, the outputs should be regarded as indicative rather than definitive.

Appendix B Assumptions used

The Cambridge Model has been modified with respect to the relative occupancy levels attained in each district, the level of overseas visitors and the proportion of business tourism in the serviced sector.

The assumed levels in each district are related to the average for the county to provide a weighting to apply to the forecast estimates generated by the Model from the demand measured in the national surveys. It should be noted that the various occupancy levels have not been applied directly to the known capacity. Occupancy levels are difficult to measure accurately across the full sample of establishments within any one district, with the more efficient businesses generally providing the bulk of the response. As a result, the direct application of surveyed occupancy levels can often result in an overestimate of volume. Equally, there is likely to be some inaccuracy in the known stock of accommodation and capacity. However, by using the relative differences as measured in the occupancy survey the likely level of variation between districts are reflected in the modified model outputs.

	Assumed occupancy Coastal	Assumed occupancy Inland	Assumed % of overseas visitors coastal	Assumed % of overseas visitors Inland	Assumed % of Business visitors Coastal	Assumed proportion of business visitors Inland
Hotels	30%	44%	3%	8%	12%	47%
Serviced	20%	34%	2%	5%	9%	19%
Self catering	40%	56%	2%	3%	N/A	N/A
Static caravan	49%	49%	2%	5%	N/A	N/A
Touring caravan and tent	18%	18%	0%	2%	N/A	N/A

Notes: Na is not applicable.

The economic section of the model generates estimates of full time employment in each tourism related business sector by dividing the estimated spend on wage costs arising from visitor spending by the average full time equivalent cost of a job in the relevant sector. The average FTE wage is derived for the region from the New Earnings Survey for each sector. However, in addition to the variation in wage costs by business sector, it is also known that wage levels in any particular district will also be affected by the general level of wages in that district. Thus employers in low wage areas can often fill vacancies at lower than average wages for that sector because of the lack of competition to drive up wages.

In order to take account of this factor, the average level of wage cost in each sector has been modified by the relative difference in overall wage levels between the district and the regional average.

NB: Regional rate based on New Earnings Survey 2003.