

Culture and Leisure Overview and Scrutiny Committee



SOUTH
KESTEVEN
DISTRICT
COUNCIL



Thursday, 30 November 2023 at 10.00 am
Council Chamber - South Kesteven House,
St. Peter's Hill, Grantham. NG31 6PZ

Committee Members: Councillor Paul Fellows, Vice-Chairman of the Council (Chairman)
Councillor James Denniston (Vice-Chairman)

Councillor Emma Baker, Councillor Harrish Bisnauthsing, Councillor Gareth Knight,
Councillor Robert Leadenham, Councillor Paul Martin, Councillor Chris Noon and
Councillor Susan Sandall

Agenda

This meeting can be watched as a live stream, or at a later date, [via the SKDC Public-I Channel](#)

- 1. Public Speaking**
The Council welcomes engagement from members of the public.
To speak at this meeting please register no later than 24 hours prior to the date of the meeting via democracy@southkesteven.gov.uk.
- 2. Apologies for absence**
- 3. Disclosure of Interests**
Members are asked to disclose any interests in matters for consideration at the meeting.
- 4. Minutes from the meeting held on 5 September 2023** (Pages 3 - 16)

5. **Updates from previous meeting** (Page 17)
6. **Announcements or updates from the Leader of the Council, Cabinet Members or the Head of Paid Service**
7. **Grantham Mid-Lent Fair - results of consultation** (Pages 19 - 38)
To consider a request to extend the dates for the Grantham Mid-Lent Fair for 2024 and beyond.
8. **Review of a district-wide Blue Plaque Guide and Information Trails** (To Follow)
9. **LeisureSK Limited Management Fee request for 2024/2025** (Pages 39 - 69)
For the Culture and Leisure Overview and Scrutiny Committee to consider the level of management fee required to support LeisureSK Ltd for financial year 2024/2025.
10. **Mid-year KPI Performance Monitoring** (Pages 71 - 85)
The Mid-Year update report outlines South Kesteven District Councils performance against the Corporate Plan Key Performance Indicators (KPIs) for the year of 2023/24.
11. **STEAM 2022 Report - Economic Impact of the Visitor Economy** (Pages 87 - 166)
The purpose of this report is two-fold. Firstly, to provide the Culture and Leisure Overview and Scrutiny Committee with an insight into the economic impact of the visitor economy in South Kesteven for 2022. Secondly, to collectively develop an understanding of the wider visitor economy landscape to identify how the Council can support the continued recovery of the sector, whilst maintaining long-term resilience amongst key stakeholders.
12. **Grantham Heritage Action Zone** (Pages 167 - 186)
This report provides an update on the progress of the High Street Heritage Action Zone shopfront regeneration programme, aimed at helping unlock the heritage potential of the town and assist in economic recovery within Grantham Town Centre.
13. **Performance of Council funded Arts venues** (Pages 187 - 196)
To provide an update on the current performance of the Council's Arts Venues.
14. **Work Programme 2023-24** (Pages 197 - 201)
To consider the Committee's Work Programme for 2023-24.
15. **Any other business which the Chairman, by reason of special circumstances, decides is urgent**

Meeting of the Culture and Leisure Overview and Scrutiny Committee

Tuesday, 5 September 2023, 10.00 am



**SOUTH
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**Council Chamber – South Kesteven House,
St Peter's Hill, Grantham, NG31 6PZ.**

Committee Members present

Councillor Paul Fellows (Chairman)
Councillor James Denniston (Vice-Chairman)

Councillor Graham Jeal
Councillor Gareth Knight
Councillor Robert Leadenhams
Councillor Paul Martin
Councillor Charmaine Morgan
Councillor Chris Noon

Cabinet Members present

Councillor Ashley Baxter (Deputy Leader of the Council)
Councillor Richard Cleaver (Leader of the Council)
Councillor Phil Dilks (Cabinet Member for Housing and Planning)
Councillor Rhea Rayside (Cabinet Member for People and Communities)
Councillor Paul Stokes (Cabinet Member for Culture and Leisure)

Other Members present

Councillor Ian Selby

Officers present

Nicola McCoy-Brown (Director of Growth and Culture, Deputy Monitoring Officer)
Craig Spence (Acting Director of Housing)
Karen Whitfield (Assistant Director of Culture and Leisure)
Jade Newby (Tourism and Visitor Economy Officer)
Beth Goodman (Leisure Officer)
Sarah Downs (Democratic Services Officer)

12. Public Speaking

There were none.

13. Apologies for absence

Apologies for absence had been received from Councillors' Emma Baker, Harrish Bisnauthsing and Susan Sandall.

Councillor Tim Harrison substituted for Councillor Baker, Councillor Charmaine Morgan substituted for Councillor Bisnauthsing and Councillor Graham Jeal substituted for Councillor Sandall.

14. Disclosure of Interests

Councillors' James Denniston and Charmaine Morgan disclosed that they were directors of LeisureSK Ltd.

15. Minutes from the meeting held on 13 June 2023

It was proposed, seconded, and **AGREED** that the minutes of the meeting held on 13 June 2023 were a correct and accurate record.

16. Announcements or updates from the Leader of the Council, Cabinet Members or the Head of Paid Service

The Deputy Leader announced that the Head of Economic Development, Jon Hinde, had recently left his post. The Officer had been involved in work supporting local businesses during the Pandemic with £56 million in support grants allocated. The Deputy Leader passed on his best wishes for the future. The Chairman added his own thanks and best wishes.

The Deputy Leader had recently attended a meeting called by Sir John Hayes, the MP for South Holland and the Deepings. This was attended by various parties including the Deepings School, the Chief Executive and Leader of Lincolnshire County Council and the Chief Executive of our own Council where the future of Deepings Leisure Centre was discussed. A Tender exercise was currently underway where bidders could express an interest in running the business.

The Leader informed the Committee that he was pleased to say that the café at Stamford Leisure Centre had now reopened and the staff that had facilitated that were thanked.

17. Update on Markets

The report was introduced by the Deputy Leader who acknowledged that the Market Deeping Market was the oldest within the District. It was believed that the Market Charter was still held in Grantham by Sir Richard Tollemache.

It was important for the Council to work closely with market traders across South Kesteven in order to maintain their viability and maximise their potential, attract footfall and aid other businesses in a town to flourish.

On 6 September 2022, the Culture and Visitor Overview and Scrutiny Committee received an update on the Council's markets. Since then, the Council's political make up had changed with street markets remaining a vital part of South Kesteven life which continue to contribute to wider social, economic and environmental strategic goals.

On 14 June 2023, a further report was presented to a meeting of the Governance and Audit Committee. This outlined the findings of a review of the operational aspects of the Council's markets service. That Committee approved an action plan and agreed to receive an update on the actions undertaken within three months of the meeting, recommending review of the market service be given further consideration by the relevant Overview and Scrutiny Committee.

The Economic Development Team periodically visited the markets in Bourne, Grantham and Stamford to observe stall occupancy levels, product offering, customer footfall, car parking movements and the general ambience on market days.

South Kesteven's markets had been a focal point of local business for centuries, playing a key part in the social, cultural and economic life of the District. However, the threat of decline had increased in recent years because shoppers had greater choice in how and where to purchase the goods, food and services traditionally associated with a street market. It was essential that consideration was given to how best the markets could be improved. The Deputy Leader recommended that the Committee consider the implementation of a 'Task and Finish' group to oversee a consultation where the best ideas could be used to make positive changes.

During discussion, Members raised the following points:

- The report was welcomed as being thorough with interesting historical facts about the markets.
- Reassurance was requested that the Council was committed to preserving, protecting and enhancing the markets.
- The stallholders needed to be at the heart of any decisions made, as they were essential to the success of the markets and attracting people to the area. Parking charges were an issue to be considered in Grantham.
- More dialogue with shopkeepers in our various towns was suggested to note how their businesses were affected by the markets.

- There were existing bodies, such as the Charter Trustees that were also happy to take an interest in the local markets. Was the creation of another group necessary?
- Car parking charges and volume of traffic were an issue in Grantham on a Saturday.
- Some elected Members were opposed to the setting up of a 'Task and Finish' group, considering the group as an unnecessary extra working group. A positive way forward was requested through a simple action plan.
- There was already a 'Town Team' for Grantham. The markets could be removed from their remit to prevent duplication of work.
- Elected Members were invited to visit the markets to show their support and speak to the stallholders. Grantham Market was known to have traders leaving their pitch once they had sold all they had.
- It was considered important to set a timescale to determine completion of a consultation, with elected Members from the whole district being involved.
- The Task Group was likely to be a sub-group of the Committee, made up of democratically elected Members who could then decide who to consult.

The Deputy Leader confirmed the Council's commitment to the markets as a way of maintaining the local economy and allowing entrepreneurs to flourish. However, it was essential that value for money was considered. Resources were not infinite. There had to be consideration as to whether the Council were the best able to run the markets. While members of the Grantham Civic Society and Charter Trustees were welcome to contribute, it would be problematic not to extend the collaboration to voices within the community. The decision remained for the operation of the markets to be the responsibility of the Council, with engagement to be encouraged from all sections of the local community. The Deputy Leader confirmed that he hoped to bring a report back to the Committee early in the new year at the meeting set for 9 January 2024.

A Member **proposed** that the Grantham Charter Trustees, alongside the Town Councils of Bourne and Stamford be tasked with overseeing the consultation of the markets.

This was **seconded**.

An amendment was **proposed** to confirm a **timeframe** within the consultation.

The Director for Growth and Culture informed Members that the Town Team had not yet been fully formed and if Members requested, it could look to oversee the consultation of the markets.

It was proposed, seconded, and **AGREED** that:

The Culture and Leisure Overview and Scrutiny Committee:

- a) considered and commented on the contents of this report.**
- b) that the Grantham Charter Trustees, alongside the Town Councils of Bourne and Stamford be tasked to overseeing a consultation regarding the future of markets, with the support of South Kesteven District Council, to report back with proposals to the Culture and Leisure Overview and Scrutiny Committee.**

18. HelloSK App and Draft Discover South Kesteven website

The Deputy Leader introduced the report.

The annual 2021 STEAM study had revealed an upturn in tourist numbers had helped to boost South Kesteven's visitor economy by 3.5% to £168.63 million and 2,232 full-time equivalent people were employed in the sector.

It was recognised further efforts were needed to attract more day and stay visitors and increase dwell time and therefore spend in the local economy. Accordingly, it was strongly believed internet marketing and the use of mobile apps could help the Council to connect with residents, businesses and visitors to show them the visual appeals of South Kesteven as a destination and possibly more exposure than could be achieved through traditional print advertising.

At its 13 June 2023 meeting, the Culture and Leisure Overview and Scrutiny Committee requested a review of the Hello SK app and the Discover South Kesteven website be added to the work programme for today's meeting.

The Welcome Back Fund provided a window of opportunity for procurement of a local app, for which £50,000 was spent on the creation and launch of the HelloSK app.

The Hello SK app was procured through a formal tender process in March 2022. The app met a desire and need to support local businesses as South Kesteven emerged from the COVID-19 pandemic. Offering a new approach to supporting the local economy, reflecting the influence of digital technology on the way consumers shop, communicate and engage with businesses.

Hello SK app was free for both businesses and consumers. Small fees of 3% of purchase price were incurred for businesses when goods are purchased through the app. This was a lower fee than many comparable apps.

Council Officers met with Bubltown, the developers of the app, fortnightly to share updates on the progress of the app, discuss opportunities for growth and hear

about best practice from other organisations using similar platforms. As of 9 August 2023, the Hello SK app had been downloaded by 1,276 consumers and contained 205 business profiles from across South Kesteven.

Discover South Kesteven was the tourism and visitor economy brand for South Kesteven District Council. The brand was well recognised and supported by its website, publications, social media presence (TikTok, Facebook, Instagram and X (formerly known as Twitter)) and in-person events, such as the successful Visitor Economy Networking Event, trade shows and business events.

The UK Shared Prosperity Fund (UKSPF) presented the opportunity to update the Discover South Kesteven website and support the tourism and visitor economy businesses across the District.

The proposed updated Discover South Kesteven website had been created with a visitor to the District in mind and supported the Hello SK app by encouraging visitors to download the app and take advantage of the Global Position System (GPS) maps function, enabling visitors to navigate from their current location and explore South Kesteven.

Members raised the following points during discussion:

- It was felt the app needed to appear more friendly and welcoming with a clear mention of South Kesteven District Council and the local area. The requirement to register may be potentially off-putting to some.
- It was hard to measure Hello SK app's success in terms of revenue.
- The Council were perhaps trying to build something that already existed. Where was the value to be achieved? If it became embedded within the culture of the district, it may be difficult to move on without it in the future, if it did not work positively.
- 13 other Councils were using the same app, however, only Coventry – a significantly larger city had over 5,000 users.
- The 3% fee was received by a private, third-party company but Council Officers were contributing their time too.
- A Member suggested that more time be given to making the app a success and building an identity. A year was not necessarily a reasonable amount of time to expect such results, especially post-pandemic.
- The Council were perhaps unable to find the resources to make the app a success through a large promotion campaign.
- Unicom Technology were shown on the 'Companies House' website as dissolved. The Council was to investigate the status of all third parties.

- Was 'South Kesteven' a strong enough brand, rather than Grantham or Lincolnshire?

The Director of Growth and Culture confirmed that the project was funded through the Welcome Back Fund at no cost to South Kesteven District Council and negligible time by Officers. Members had agreed at previous meetings to set up an app following funding received from the Government. The feedback received was to be considered and addressed with Bubltown, including the technological requirements to advance the app. Members had requested ideas to attract visitors to the area and the app was one of several such ideas.

The Tourism and Visitor Economy Officer informed Members that the Christmas 2022 campaign had been the most successful to date. Ideas for the coming year would involve local community groups and schools. It was believed Unicom Technologies had undergone a name change and this was yet to be updated on the website.

A Member proposed that Members that were involved in the decision to produce the app, collaborate with the Director of Growth and Culture and her team to develop ideas.

It was **proposed and seconded** that the Culture and Leisure Overview and Scrutiny Committee recommend to Cabinet that the HelloSK app no longer be used.

The Committee voted 4 in favour and 5 **against** the proposal.

The Director of Growth and Culture asked Members to consider allowing work to continue on the draft Discover South Kesteven website enabling the website to go live as soon as possible.

It was proposed, seconded, and **AGREED** that **the Culture and Leisure Overview and Scrutiny Committee:**

- Considered the progress of the Hello SK app, making any suggestions of additions or amendments which should be reflected.
- Endorsed the proposal to release a survey over the coming months to encourage feedback from businesses and consumers who use the Hello SK app.
- Considered the content of the updated Discover South Kesteven website and Hello SK app, looking at them clinically, taking good advice and making any specific suggestions to be considered by the Culture and Leisure Overview and Scrutiny Committee, for amendments to be reflected prior to publication (viewable) live on the web.

- d) **Agreed to receive a quarterly update on the Hello SK app and a six-monthly update on the Discover South Kesteven website.**

19. Outturn 2022/23 position for LeisureSK Ltd

LeisureSK Ltd was a not-for-profit Teckal company, wholly owned by South Kesteven District Council. The company was formed in September 2020 and commenced the management of Council owned leisure facilities from 1 January 2021. The contract covered a five-year period and was due to end on 31 December 2024.

In previous years, the Council's former Companies Committee received details on the financial performance of LeisureSK Ltd and approved the annual Business Plan. In line with the Council's Constitution, this responsibility now lies with the Culture and Leisure Overview and Scrutiny Committee. A copy of the final audited accounts for LeisureSK Ltd for financial year 2021/2022 were presented to a meeting of Companies Committee on 10 January 2023 along with the Business Plan for 2023/2024.

The final accounts for financial year 2022/2023 were to be presented to a future meeting of the Culture and Leisure Overview and Scrutiny Committee for consideration, once these were received from the auditors.

During financial year 2022/2023 LeisureSK Ltd faced financial and operational challenges, especially in relation to the cost of utilities and the recruitment and retention of staff. In operating the leisure facilities under a local authority trading company model, the Council had full transparency on the income and expenditure and wider performance of the company.

Members raised the following points during discussion:

- It was suggested that a tour for Committee Members be given of all the leisure facilities within the District, including Deepings Leisure Centre.

The Assistant Director of Culture and Leisure informed Members that the Deepings Leisure Centre building had been handed back to Lincolnshire County Council and their agreement was required before Members were to be shown around the area.

ACTION:

Committee Members to receive a tour around the District's leisure facilities.

(As Directors of LeisureSK Ltd, Councillors' Denniston and Morgan left the Chamber before the vote at 12:50)

It was proposed, seconded and **AGREED** that the Culture and Leisure Overview and Scrutiny Committee:

- a) **Agreed to receive the final audited accounts at a future meeting once these are available.**
- b) **Agreed to receive further updates on the performance of LeisureSK Ltd, this is to include an assessment of the annual Business Plan.**

(Councillors' Denniston and Morgan rejoined the meeting at 12:55)

It was **AGREED** that the meeting be extended to continue after 3 hours.

20. Sport and Physical Activity Strategy Action Plan six-monthly update

The Cabinet Member for Culture and Leisure presented the report.

The Council's Sport and Physical Activity Strategy was adopted in 2021. The Strategy focused on a collaborative approach along with other providers within the District in order to increase levels of physical activity.

The report provided a wide range of information on work undertaken by the Leisure Team to support the strategy outcomes, including those elements of work undertaken with wider partners and stakeholders.

The report also provided information on the most recent 'Active Lives Adult Survey' data which was published in April 2023.

The Assistant Director of Culture and Leisure informed the Committee that the Government had recently announced a new strategy called 'Get Active – the future of sport and physical activity'. Officers were currently exploring the context of the new strategy and assessing whether amendments were required, if so, amendments would be brought back to the Committee for approval in the future.

One Member suggested the consideration of the private and voluntary sectors within sport provision- be included within the strategy to promote physical activity throughout the District.

Concern was raised on costings to support voluntary sector classes. It was queried whether the Council could support the groups financially or whether any funding opportunities may be available to them.

The Assistant Director of Culture and Leisure clarified that voluntary physical activity groups may be eligible to utilise the Council's Community Fund.

In noting the progress and delivery of the Sport and Physical Activity Strategy for South Kesteven, the Culture and Leisure Overview and Scrutiny Committee:

- a) Considered the results of the latest Active Lives data available for South Kesteven and agreed the results of future Active Lives survey data form part of future regular six-monthly updates.**
- b) Suggested enhancements to the extent and clarity of the information produced for the next six-monthly update report.**

21. Cultural Strategy KPIs

The Culture and Leisure Overview and Scrutiny Committee had agreed to receive six monthly updates on the progress and delivery of the Action Plan within the Cultural Strategy. During the debate at the meeting held on 13 June 2023, it had been agreed a series of draft key performance indicators would be presented for consideration at a future meeting of the Committee, which would go on to form the basis of the six-monthly updates. At a meeting of Cabinet on 11 July 2023, the Cultural Strategy (2023 to 2026) was formally adopted as the key strategic document to underpin the delivery of cultural activity across South Kesteven.

A series of key performance indicators have been drafted for consideration.

The key performance indicators were to be updated at six monthly intervals to demonstrate progress with the implementation of the Cultural Strategy. In addition to sharing any highlights or successes, it was equally important to bring to Members' attention any areas or workstreams which had proved more challenging. A further report was to be presented to the Culture and Leisure Overview and Scrutiny Committee on 30 November 2023 which would provide information on the wider performance of the Council's Arts Service.

One of the key objectives of the Cultural Strategy was to widen the participation and reach of the Council's arts service, ensuring accessibility for all. To support this ambition, it was proposed a 'Pay it Forward' scheme be introduced. Pay it Forward schemes had been successfully introduced nationally as a fundraising initiative, the resulting funds being used to enable local residents, including children and families, to attend cultural events for free.

As the free usage is fully covered by donations, the free participation will not directly impact the income of the performers, workshop leaders and touring companies. This is extremely important given the impact of COVID-19 and the associated recovery period on the livelihoods of those engaged in the arts. Free usage would be available across all three of the Council's artistic venues (Guildhall Arts Centre, Stamford Arts Centre and the Bourne Corn Exchange). Activity would not be limited to live performances and could include films, workshops and other interactive sessions.

During discussion, Members raised the following points:

- The report was welcomed, especially around collaboration and partnership. Culture arises from the communities.
- Was it possible that local businesses could support the 'Pay it Forward' Scheme? The Council should encourage all the support that it could and aim to encourage all demographics to enjoy arts and culture.
- Rural communities with weaker transport links were a barrier and prevented some senior members of the community from travelling into the towns.
- Were the Council still able to access funds from the Lottery Scheme? Such funds could support the Pay it Forward Scheme?

The Assistant Director of Culture and Leisure informed Members that the Council supported the rural touring scheme which provided high quality artistic performances in local village halls.

The Director of Growth and Culture confirmed the team would look into the availability of Lottery funds and report back to Members of the Committee.

It was proposed, seconded and **AGREED that the Culture and Leisure Overview and Scrutiny Committee:**

- a) Considered the draft Key Performance Indicators, suggesting amendments or additions.
- b) Agreed the final version of the Key Performance Indicators will form part of formerly agreed six monthly updates on the implementation of the Cultural Strategy.
- c) Supported the introduction of a Pay it Forward Scheme across the Council's Arts and Cultural venues.

22. Work Programme 2023-24

The Committee noted the Work Programme.

The Assistant Director of Culture and Leisure requested an additional agenda item to the meeting on 30 November 2023. The Showman's Guild requested that the Grantham Mid-Lent Fair change or extend the times. Consultation was underway to be reported back to the Committee.

The Visitor Economic Strategy was agreed to be deferred to a meeting in the new year.

The STEAM data update was agreed to be brought to 30 November meeting.

The consideration of holiday activity provision for young people across the summer within the District was requested prior to March 2024, within the remit of the District Council.

23. Any other business which the Chairman, by reason of special circumstances, decides is urgent

There was no other business.

24. Performance of LeisureSK Ltd

The Director of Growth and Culture presented the report.

This report covered activities which had taken place between January 2023 and July 2023.

LeisureSK Ltd continued to face operational challenges relating to the availability of supplies and services, and increased supplier costs, especially in relation to utilities. This aligned with the national picture and the challenges being faced by other leisure providers. As a result of increased utility and staffing costs, a management fee of £500,000 for LeisureSK Ltd was approved at Full Council on 1 March 2023 as part of the Council's annual budget setting process.

The recruitment of suitably qualified staff continued to be a challenge within the leisure industry, this had caused difficulties at Grantham Meres Leisure Centre where there had been a higher turnover of staff. The Contract Manager for LeisureSK Ltd, with the support of the Board, continued to review the company staffing structure to try and mitigate the increased cost of operating the three leisure centres without impacting upon the levels of service delivery and customer experience.

As a result of the rising energy costs, the Board of Directors recently commissioned energy efficiency surveys across the three leisure centres. The surveys were undertaken by a sector leading energy saving consultancy firm - Leisure Energy Ltd. The resulting reports highlighted a range of energy saving measures.

The Culture and Leisure Overview and Scrutiny Committee considered whether any enhancements were required to the level of information provided for inclusion in the next six-monthly update.

*(At 13:46 the Committee **AGREED** to exclude the Press and Public from the meeting on the grounds that if they were to be present, exempt information could be*

disclosed to them as defined in the relevant paragraphs of Schedule 12A of the Act).

(Restricted Minute)

25. Close of meeting

The Chairman closed the meeting at 13:55.

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Action Sheet

Culture and Leisure Overview and Scrutiny Committee – Actions from meeting of 5 September 2023

Min no	Agenda item	Action	Assigned to	Comments/Status	Deadline
19	Outturn 2022/2023 position for LeisureSK Ltd	Committee Members to receive a tour around the District's Leisure Facilities	Nicola McCoy-Brown (Director of Growth and Culture)	Tour took place on Tuesday 31 October 2023	Complete

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Culture and Leisure Overview and Scrutiny Committee

30 November 2023

Report of Councillor Paul Stokes,
Portfolio Holder for Culture and Leisure

Grantham Mid-Lent Fair – Consideration of Event Dates Extension

Report Author

Karen Whitfield, Assistant Director (Leisure, Culture and Place)

 Karen.whitfield@southkesteven.gov.uk

Purpose of Report

To consider a request to extend the dates for the Grantham Mid-Lent Fair for 2024 and beyond.

Recommendations

The Culture and Leisure Overview and Scrutiny Committee are requested to:

1. Consider the proposal received from the Showman's Guild to amend the event period for the Grantham Mid-Lent Fair in line with the results of the consultation undertaken to assess support from local residents and businesses.
2. Provide guidance to Officers whether the proposal to change the dates for the Grantham Mid-Lent Fair should be accepted, and an application be made to the Secretary of State for approval.

Decision Information	
Does the report contain any exempt or confidential information not for publication?	No
What are the relevant corporate priorities?	Growth and our economy Housing that meets the needs of all residents Healthy and strong communities Clean and sustainable environment High performing Council
Which wards are impacted?	Grantham Wards

1. Implications

Taking into consideration implications relating to finance and procurement, legal and governance, risk and mitigation, health and safety, diversity and inclusion, safeguarding, staffing, community safety, mental health and wellbeing and the impact on the Council's declaration of a climate change emergency, the following implications have been identified:

Finance and Procurement

- 1.1 The Showman's Guild pay the Council a hire fee to hold the Grantham Mid-Lent Fair. In addition to this the costs the Council incurs in relation to setting up and taking down the fair and Officers time to undertake stewarding duties, are recharged to the Showman's Guild. Therefore, there is no financial burden on the Council in relation to the Fair.
- 1.2 Should the dates of the Fair be changed for 2024 the Council would incur costs in relation to making an application to the Secretary of State and amending the waste collection rounds. These, together with any other costs or loss of income identified, will need to be agreed in advance with the Showman's Guild for reimbursement to the Council.

Completed by: Richard Wyles, Deputy Chief Executive and s151 Officer

Legal and Governance

- 1.3 The authority to hold the Mid-Lent Fair is contained within the Royal Charter of Grantham 1484. The Charter contains a restriction that the Mid-Lent Fair shall be held in each year on the fifth Sunday of Lent and the Monday, Tuesday and Wednesday following. The Charter was subsequently amended by an Order dated 26 February 2001 made by the Home Office under Section 6 of the Fairs Act 1873. This Order provides any changes to the current opening and number of days the

Mid-Lent fair is held in Grantham would require an application to the Secretary of State.

- 1.4 There would be a cost involved in applying to the Secretary of State for an Order to amend the days for the Grantham Mid-Lent Fair for 2024, if granted the Order is temporary and can only remain in place for that year. A further application would be required in subsequent years to either revert to the dates previously used or for any other alterations to the dates.
- 1.5 The timeframe to make an application and receive a decision would be between eight to twelve weeks.

Completed by: Mandy Braithwaite, Legal Executive

Health and Safety

- 1.6 Historically the Mid-Lent Fair in Grantham has been supported by Council Officers who ensure that the fair is safely set up and taken down and undertake stewarding duties. In 2023 there were significant instances of anti-social behaviour which Officers had to respond to with the assistance of the Police.
- 1.7 The Council has a duty of care to protect its employees and a debrief meeting was held with the Showman's Guild to share these concerns. During this meeting it was agreed that trained professional stewards are to be employed for future years who are more able to deal with the incidences of anti-social behaviour which were encountered for the duration of the Fair in 2023.
- 1.8 The Council's Health and Safety team provide support to ensure that all activities and procedures in relation to the fair conform to health and safety standards.

Completed by: Phil Swinton, Emergency Planning and Health and Safety Lead

Waste Service

- 1.9 The proposal to move the dates for the Mid-Lent Fair would have a serious impact on the Council's Waste Service. It is essential for the Council to maintain the continuity of our services whilst addressing the needs of local businesses and residents and the necessary road closures to accommodate the revised dates would prevent or hinder regular refuse collection rounds.
- 1.10 The proposals would necessitate the Council exploring alternative arrangements for refuse collections in the affected areas which include Union Street, Conduit Lane, Market Place, Wide Westgate, Narrow Westgate, Welby Street and part of Guildhall

Street. This would involve rescheduling collection dates or providing temporary collection points outside of the closed off streets.

- 1.11 Any changes to the Council's routine waste collection arrangements would cause significant disruption to local residents and businesses, and alternative arrangements would be an additional cost to the Council.

Completed by: George Chase, Waste and Recycling Operations Manager

2. Background to the Report

- 2.1 The Council's Corporate Plan (2020 – 2023) contains a key priority of 'Growth and our Economy' with a vision to developing the centres and high streets of our towns.
- 2.2 Historically, Mid-Lent Fairs have been held in Grantham and Stamford and are arranged by the Showmen's Guild of Great Britain (the Derbyshire, Nottinghamshire, Mid and South Lincolnshire section). To date the Stamford fair has been held over six days, and the Grantham Fair over four days.
- 2.3 The Council have received a request from the Showman's Guild to extend the number of days for the Grantham Fair by one day to a total of five days and for the duration of the fair to cover a weekend. If this request is approved the Mid-Lent Fair would run from Wednesday 20 March 2024 through to Sunday 24 March 2024 rather than the fair arriving in Grantham on 17 March 2024 to Wednesday 20 March 2024.
- 2.4 Should the change of dates be accommodated, to enable rides and stalls to be safely erected and dismantled, road closures would be in force from 5pm on Tuesday 19 March 2024 until 8am on Monday 25 March 2024.
- 2.5 The authority to hold the Mid-Lent Fair in Grantham is provided by The Royal Charter of Grantham 1484. This grants the rights for ordering, governing, and assigning of stalls in relation to the fair. Therefore, should the Council agree to any changes to the dates of the Grantham Mid-Lent Fair, this decision would need to be referred to the Secretary of State for final approval.
- 2.6 The Council receives a payment for the Stamford and Grantham fairs which includes an element of rental for the space, and in addition the Council is recompensed for the associated staffing costs in relation to the setup and takedown of the fairs, and any stewarding resource provided.

Consultation Methodology

- 2.7 To ensure Members can consider the views of residents and businesses which may be impacted by the changes, especially in relation to the extended road closure, a robust consultation exercise has been undertaken.

2.8 The objectives of the consultation have been to:

- Communicate the changes which will happen if the proposal is approved to local businesses and residents.
- To allow those impacted, and the wider population, an opportunity to submit their views.
- Establish what stakeholders think of the proposal to extend the duration of the Mid-Lent fair in Grantham.
- Ask statutory agencies for their views on the proposal including Lincolnshire Police, Lincolnshire Fire and Rescue, and Lincolnshire County Council.
- Identify any issues which may occur as a result of the changes.

2.9 The consultation was well publicised, this included a press release launching the consultation, social media posts, and details were also provided on the Council's website. All content included links to an on-line survey via a web link or QR code. The consultation ran for a four-week period from 4 September 2023 to 2 October 2023.

2.10 In addition, a flyer was hand delivered to 520 businesses and residents in Grantham who would be most impacted, the flyer promoted the consultation and included a printed copy of the survey. This was made up of 272 businesses and residents, 208 taxi operators and 40 market traders. The flyer contained information relating to the survey with recipients being given the option to complete the survey online or complete a paper copy.

2.11 All statutory consultees received a letter detailing the request to move the dates for the Grantham Mid-Lent Fair, the letter requesting feedback and comments.

Results of Consultation

2.12 Following the end of the consultation period the survey responses have been analysed and **Appendix One** provides a copy of the Consultation Report. The following paragraphs provide a summary of the key information.

2.13 A total of 222 survey responses were received, of which 213 were via the online link and 9 were printed copies which were input manually.

2.14 The first question asked whether residents and businesses agreed or disagreed with the proposal to move the fair dates. The initial response was that 55% either strongly agreed or agreed with the proposal, with 38% disagreeing and 7% neither agreeing nor disagreeing.

2.15 However, when an analysis was conducted against the postcodes of respondents who would be most affected by the road closure order, then 78% of the respondents disagreed with the proposal.

2.16 Respondents were asked why they either supported or objected to the proposal, an analysis of the responses is highlighted in **Table One** overleaf:

Table One – Analysis of Comments provided to support or object to the proposal to move the dates for the Grantham Mid-Lent Fair	
Support	Objections
<ul style="list-style-type: none"> • It will generate more trade • It gives people more opportunity to visit the fair • It's good for the local community 	<ul style="list-style-type: none"> • The negative impact on trade • The disruption and congestion caused in the centre of Grantham • Difficulties with access • Cost of the fairground rides

2.17 When respondents were asked how they might be affected by an extension to the Mid-Lent Fair dates, most comments centred on the disruption and congestion which would be caused by traffic, especially as Saturday is the busiest day for businesses, market traders and taxi firms. In addition, comments were received the proposal would cause access issues for residents, customers and retail deliveries.

2.18 Analysis of the survey responses demonstrated 49% of respondents supported the proposal put forward by the Showman's Guild to change the dates of the Mid-Lent Fair, with 36% who did not agree. However, when these responses were further analysed against the postcodes of respondents who would be most affected by the road closure, 8% agreed with the proposals and 69% did not agree.

2.19 When asked if changing the days of the Mid-Lent Fair would affect respondents or their businesses, 71% stated it would not and 20% thought it would impact them. The businesses who responded were concerned about the impact on trade, with residents being more concerned about access as well as noise and light pollution from the fairground rides. Some of the quotes received are provided below:

“Yes of course it will not only in Westgate and the Market Place but all traders in the town as footfall will be down considerably”

“... the rides are right in front of my gates and my customers don't like the noise or disruption”

“.... The Grange now has more light pollution from strobe effects”

2.20 85% of responses received were from those who were not contacted directly. This is important to note as it may mean residents and businesses who would be most affected, are underrepresented in the survey results.

2.21 The Council's Corporate Facilities and Events Supervisor contacted the statutory stakeholders and the following feedback was received:

- Lincolnshire County Council did not formally comment on the proposal. The feedback received centred on operational requirements, including the need for additional road signage and a requirement for a formal traffic management plan.
- The District Safety Advisory Group (SAG) did not object to the proposals. Unfortunately, the Police, Lincolnshire County Council Emergency Planning, Grantham area Fire and Rescue or East Midlands Ambulance Service (EMAS) were not in attendance at the meeting when this issue was discussed. These organisations were subsequently contacted individually, however no responses have been received.

2.22 Should the proposal from the Showman's Guild be accepted then this would necessitate a relocation of the Grantham market on Saturday 23 March 2024. There are options to relocate the market including on St Peter's Hill, however not all the stalls could be accommodated within the available space and a further road closure would be required.

2.23 Guildhall Street is also an option for a relocated market, but this would also require a road closure, and would restrict access to the Council's pay and display car park, the private car park at the rear of Boots and the private car park for the George Centre. Access for deliveries within the Issac Newton Centre, and for Boots and B & M Bargains would also be impacted. The road is narrow, and to ensure the 4 metre emergency route can be maintained, again not all of the stalls could be accommodated.

2.24 A further option for the relocated market could be Greenwoods Row car park which would not require a road closure but would involve loss of car park income for the Council which would need to be recharged to the Showman's Guild.

2.25 Buckminster Estates hold the Charter for the market and were contacted and had no objections. Furthermore, ASDA were also approached for their views but no response was received.

3. Key Considerations

3.1 Any changes to the current opening and number of days of the Mid-Lent Fair would require an application to the Secretary of State under Section 6 of the Fairs Act 1873.

3.2 The application process for the necessary road closures for Stamford and Grantham Fairs is a total of thirteen weeks. The road closure application for the Grantham Mid-

Lent Fair therefore needs to be submitted by Friday 8 December 2023. An application to the Secretary of State could run in parallel to awaiting this decision.

3.3 Any impact on the operation and financial performance of the market requires careful consideration alongside the Council's ambition to improve the operation and viability of Grantham market.

4. Other Options Considered

4.1 This report details a proposal from the Showman's Guild to extend the opening times for the Mid-Lent fair in Grantham for 2024. Should this proposal not be supported, the Grantham Mid-Lent Fair would remain on the traditional days as set out in the Royal Charter of Grantham 1484.

5. Reasons for the Recommendations

5.1 The Culture and Leisure Overview and Scrutiny are requested to consider the proposal received from the Showman's Guild to change the dates for the Grantham Mid-Lent Fair in 2024 and considering the results of the consultation which has been undertaken, determine whether this proposal should be supported.

6. Appendices

6.1 **Appendix One** – Results of Grantham Mid-Lent Fair Consultation.

GRANTHAM MID LENT FAIR CONSULTATION SEPTEMBER 2023



SOUTH
KESTEVEN
DISTRICT
COUNCIL

October 2023

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Purpose

1. The purpose of this report is to update the Council, Cabinet and in particular the Cabinet Member for Leisure and Culture – Councillor Paul Stokes - with the results of the consultation that has been undertaken with various stakeholders on the proposals to:
 - extend the duration of the Mid Lent Fair in Grantham from four days to five
 - change the days the Mid Lent Fair is in Grantham
2. This consultation has been undertaken in response to two requests made by the Showmen's Guild of Great Britain - the Derbyshire, Nottinghamshire, Mid and South Lincolnshire section. If the proposal to extend the duration of the fair is approved, the Mid Lent Fair would increase from four days to five in Grantham. If the proposal to change the days the fair is in Grantham is approved, the Mid Lent Fair would be in Grantham from Wednesday 20 March through to Sunday 24 March (instead of Sunday 17 March through to Wednesday 20 March).

Objectives

3. The main objectives of the consultation were identified as follows:
 - To ensure that local businesses and residents who may be directly affected by the proposals were given an opportunity to submit their views
 - To find out what they think of the proposals and if they support them or not. This included those who live or have businesses within the areas affected by the road closure order and also those who operate by licence within these areas. These included market traders and hackney carriage/ taxi drivers.
 - To ensure various statutory agencies were contacted and asked to comment. These included Lincolnshire Police, Lincolnshire Fire and Rescue and Lincolnshire County Council.
 - To ensure that any other stakeholders (other local residents and businesses not directly affected by the proposal) had an opportunity to have their say
4. The subsidiary objectives of the consultation were identified as follows:
 - To establish if there were any issues for those living and/or working in the areas identified as being most affected by the proposal
 - To communicate the changes that would happen if the proposals were approved to four main groups of stakeholders – residents, local businesses, those who operate by licence in this area (market stall holders and hackney carriage licence holders) and statutory stakeholders

Legislation

5. The actions identified in this consultation were governed by the Markets and Fairs Clauses Act 1847¹ – in particular clauses 42 and 44.

¹ [Markets And Fairs Clauses Act 1847 \(legislation.gov.uk\)](https://www.legislation.gov.uk)

Methodology

6. A survey was prepared that was structured around these objectives. 272 residents and businesses and 248 licence holders who live and/or work in the area where the road closure is in place to accommodate the fair were contacted directly. They were sent a copy of an A5 flyer outlining the reasons for the consultation and a printed copy of the survey. Those contacted were asked to either complete the printed copy of the survey and return it to the Council Offices/ Customer Services Centre Access Point or to access the survey via a web link or QR code.
7. The consultation was promoted to other residents and businesses not classified as being directly affected by the proposal via social media channels and also in the local media. Stakeholders could respond via a web link or QR code. If they required a printed version, they were asked to contact the Corporate Facilities and Events Supervisor.
8. Statutory stakeholders including Lincolnshire Police, Lincolnshire Fire and Rescue and Lincolnshire County Council were contacted directly by the Corporate Facilities and Events Supervisor. She also contacted Asda (because their deliveries are directly affected by the Mid Lent Fair) and Buckminster Estates – the holder of the Market Charter (as the market would need to re-locate temporarily on Saturday 23 March if the proposal was approved).
9. The consultation ran for four weeks from 4 September 2023 to 2 October 2023. Most responses (213 or 95.9%) were collected on-line via the web link. 222 responses were received in total.

Details

10. To help the council understand the degree of support or otherwise for the proposal to extend the duration of the Mid Lent Fair in Grantham and change the days it was in Grantham, the consultation officer was asked to work with the Corporate Facilities and Events Supervisor to draw up plans to consult with local residents and businesses and other stakeholders.
11. To this end 272 local residents and businesses were contacted directly, along with 248 taxi drivers and market stall holders. The survey, along with a flyer, was sent to properties on a number of streets affected by the road closure order. This included residential and business properties in Westgate, Greyfriars and Conduit Lane.
12. The flyer set out why the council is considering the requests from the Showmen's Guild to possibly extend the duration of the Mid Lent Fair in Grantham and change the days it is in Grantham. It also mentioned that should the proposals be approved; they would have to be submitted to one of his

majesties principal Secretaries of State in accordance with the requirements set out in the Markets and Fairs Clauses Act 1847 (clause 44).

13. The survey was structured around two proposals. These were a proposal to extend the duration of the Mid Lent fair in Grantham and a proposal to change the days the fair is in situ. It included questions designed to capture and/ or measure:

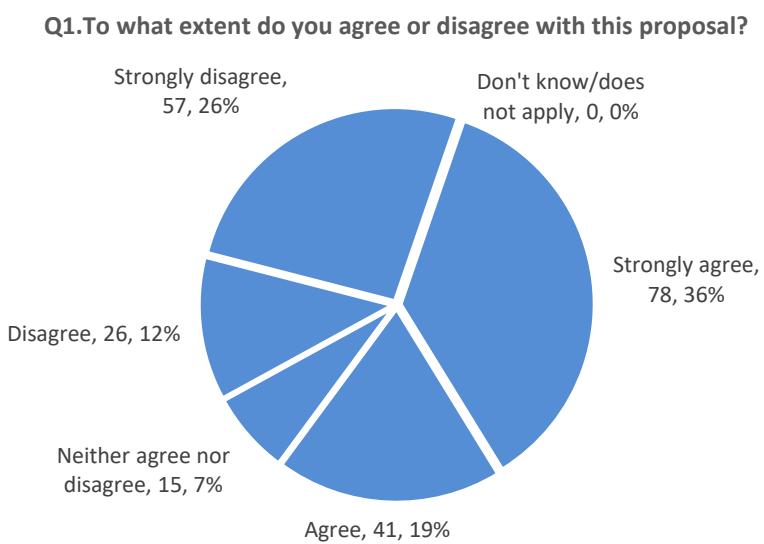
- The degree of support for the proposals
- Whether the proposal to extend the duration of the fair would affect them or not
- Whether the proposal to change the days the fair is in Grantham would affect them or not
- Whether they were a local resident, a business or a trader operating under licence
- Where they live
- If they had any queries

14. The consultation closed on 2 October 2023. 222 responses were received, of which 213 were via the link and 9 were printed copies which were input manually.

Results

Agreeing or disagreeing with the proposal to extend the duration of the Mid Lent Fair

15. The first question residents and businesses were asked was the extent to which they agreed or disagreed with the proposal to extend the duration of the Mid Lent fair in Grantham from four days to five. Just over half of those responding (119 or 54.8%) agreed with this proposal, as illustrated in the graph below:



16. Cross tabulating these responses against the postcodes of respondents directly affected by the road closure order revealed more than three quarters (78.3%) disagreed with the proposal. This is illustrated in the table below:

	No	%
Strongly agree	0	0
Agree	3	13.0
Neither agree nor disagree	2	8.7
Disagree	2	8.7
Strongly disagree	16	69.6
Don't know/does not apply	0	0
Total	23	100.0

17. Respondents were then asked to detail why they supported or objected to the proposal. An analysis of responses to this question revealed the following themes.

Some respondents were in favour of the extension because:

- It will generate more trade
- It gives people more opportunity to visit the fair
- Its good for the local community

“Hopefully more trade”

“.... more people will have time to go to the fair with it being a weekend...”

“Just great for community life”

Some were against the extension because:

- Of the negative impact it would have on trade
- The disruption and congestion in the centre of Grantham
- Of difficulties with access
- Of the costs of fairground rides

“As a retailer it’s bad enough to have them here for 3 trading days at the beginning of the week without losing trade on Friday and Saturday which are our busiest days”

“Causes a lot of problems getting around the town centre.”

“it would inconvenience locals especially the many elderly who live close by who suffer the noise and difficulty accessing their properties.”

“We are in a cost-of-living crisis.... The price of rides is ridiculously high.....”

The effect that extending the duration of the fair might have

18. Respondents were then asked if extending the duration of the fair from four days to five would affect them or their business directly. Around a quarter (56 or 25.8%) of respondents thought that it would, with two thirds (144 or 66.4%) stating that it wouldn't. 17 respondents (7.8%) didn't know. Of the 56 respondents that answered yes to this question, 21 were local businesses, 28 were residents, 3 were market traders and 2 were hackney carriage licence holders.

19. When asked to describe how they might be affected by an extension, an analysis revealed that most comments centred on the disruption and congestion caused by the fair. The impact it would have on trade and the market (with Saturday being the busiest day for businesses, market traders and hackney carriage licence holders), and access for residents, customers and deliveries were common responses. The amount of noise generated by fairground rides was also mentioned, as illustrated here:

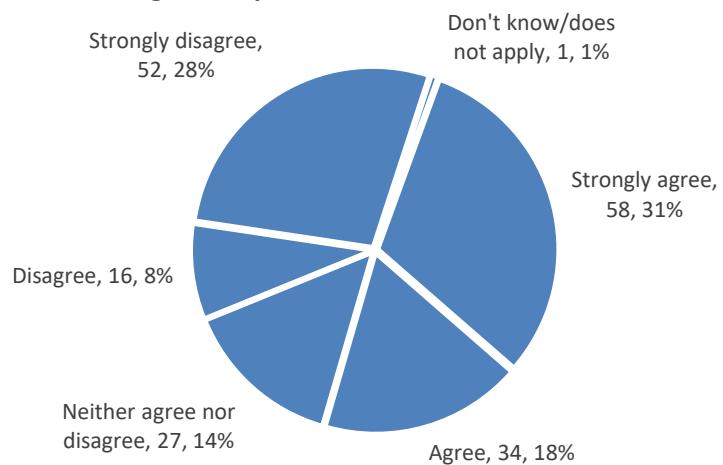
“My office is in the Market Place and every year we have to close when the fair starts as the noise is deafening, it shakes the windows in our old building, so we cannot concentrate or make phone calls.”

“I am a taxi driver with the traffic jams it will cause I will not be able to work as it would be a waste of time”

“Getting around the town becomes very difficult”

20. Just under half (92 or 49%) of respondents supported the proposal put forward by the Showmen's Guild to change the days the Mid Lent Fair visits Grantham. Just over a third (68 or 36.2%) didn't, as illustrated in the chart below:

Q5. To what extent do you agree or disagree with the proposal to change the days the Mid Lent Fair is in Grantham?



21. Cross tabulating these responses against the postcodes of respondents directly affected by the road closure order revealed the same number strongly disagreed with the proposal to change the days the Mid Lent Fair visits Grantham as strongly disagreed with the proposal to extend the fair by one day. This is perhaps not surprising and is illustrated in the table below:

	No	%
Strongly agree	0	0
Agree	2	8.7
Neither agree nor disagree	5	21.7
Disagree	0	0
Strongly disagree	16	69.6
Don't know/does not apply	0	0
Total	23	100.0

22. When asked if changing the days of the week the Mid Lent Fair is in Grantham would affect them or their business directly, seven out of ten respondents (133 or 71.5%) stated that it wouldn't. Around a fifth of respondents (38 or 20.4%) thought that it would. 15 respondents (8.1%) didn't know.

23. The quotes below are indicative of the comments made by respondents about this issue. The impact of the change on footfall was a concern for businesses, as was access to their premises. Residents were also concerned about access as well as light and noise pollution from the fairground rides.

“Yes of course it will not only in Westgate and the Market Place but all traders in the town as footfall will be down considerably...”

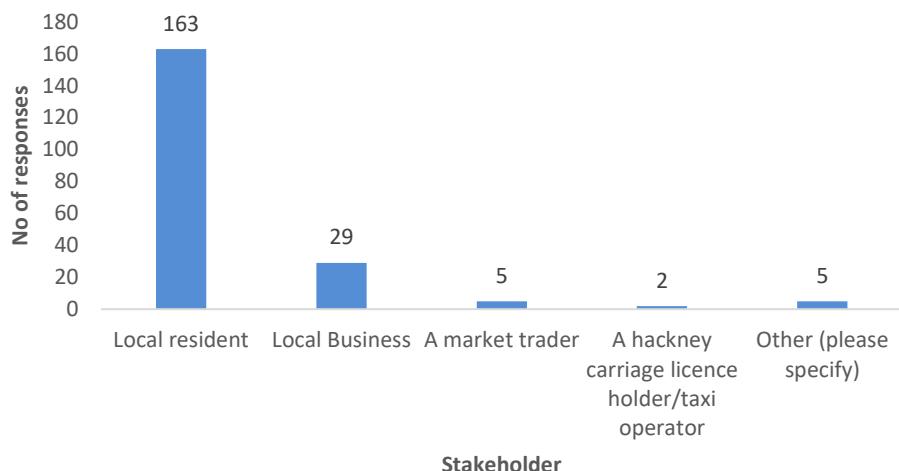
“... the rides are right in front of my gates and my customers don't like the noise or disruption”

“.... The Grange now has more light pollution from strobe effects...”

Stakeholder Information

24. The graph overleaf shows the number of responses received from the various stakeholders. Most were from residents and/or businesses as shown here:

Q9. No of responses received from various stakeholders



25. The majority of responses were from those who were not contacted directly and asked to take part. Eight out of ten respondents (162 or 85.7%) said that they had **not** been contacted directly. This is important because it means those who live or work in the area affected by the road closure order - who are therefore more likely to be directly affected by the proposals - could possibly be under-represented in the distribution of responses. The reasons for this lack of response from this section of the population are not known.

26. This is also evident when the postcodes of respondents are considered. To help the council understand how the proposal might affect local people and businesses directly, depending on where they live or work, respondents were asked to supply the first few digits of their postcode. Nine out of ten respondents (89.6%) were from the centre and outskirts of Grantham as illustrated below:

Postcode	no	%
LE15 7	1	0.6
NG23 5	2	1.2
NG24 2	1	0.6
NG31	5	3.0
NG31 6	34	20.7
NG31 7	34	20.7
NG31 8	34	20.7
NG31 9	40	24.5
NG32	3	1.9
NG32 1	1	0.6
NG32 2	2	1.2
NG33 3	3	1.9
PE9 2	2	1.2
PE11	1	0.6
SW6	1	0.6
	164	100.0

27. However, only 23 responses were received from those with postcodes in the area affected by the road closure order.

Other comments

28. An analysis of the free text responses to the question asking if respondents would like to comment on anything else revealed a handful of common themes. The most popular by far was a request to move the fair to another location as illustrated in the word cloud below:



Statutory and other consultees

29. Statutory stakeholders were contacted directly by the Corporate Facilities and Events Supervisor. Feedback was received from:

- Lincolnshire County Council. They didn't comment on the proposal, but on operational elements of the Mid Lent Fair, including road not gritted signs, the requirement to have a formal traffic management plan and a request to see the plan of where the rides will be situated
- The District Safety Advisory Group (SAG). They didn't have any objections to the proposals. Unfortunately, the police, LCC Emergency Planning, Grantham area Fire and Rescue or East Midlands Ambulance Service (EMAS) were not in attendance at the meeting when this was discussed. These organisations were contacted individually but no feedback was received.

30. Buckminster Estates (who hold the charter for the market) had no objections. No response was received from Asda.

Conclusion

31. The purpose of this consultation was to establish if the proposal to extend the Mid Lent Fair in Grantham from four days to five would be supported by local people and businesses. Those who live or work in the area affected by the road closure order were contacted directly, with others made aware of the opportunity to participate through the local and social media channels.
32. Just over half of respondents (119 or 54.8%) supported the proposal to extend the Mid Lent Fair in Grantham. Just under half (92 or 49%) supported the proposal to change the days the Mid Lent Fair visits Grantham – from Sunday 17TH March to Wednesday 20th March 2024 to Wednesday 20th March to Sunday 24th March 2024.
33. It should be acknowledged however, that the majority of responses were received from individuals or businesses not directly affected by the changes. When responses from those affected by the road closure order were considered independently, seven out of ten did not support these proposals.
34. The Council is asked to consider the feedback contained within this report. When the decision has been made the Showmen's Guild of Great Britain (the Derbyshire, Nottinghamshire, Mid and South Lincolnshire section), the statutory stakeholders as well as Buckminster Estates will be contacted by the Corporate Events and Facilities Supervisor.

Prepared by Deb Wyles
Communication and consultation
7 November 2023



SOUTH
KESTEVEN
DISTRICT
COUNCIL



Culture and Leisure Overview and Scrutiny Committee

30 November 2023

Report of Nicola McCoy-Brown,
Chairman of LeisureSK Ltd

LeisureSK Ltd Management Fee 2024/2025

Report Author

Nicola McCoy-Brown, Chairman of LeisureSK Ltd

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Purpose of Report

For the Culture and Leisure Overview and Scrutiny Committee to consider the level of management fee required to support LeisureSK Ltd for financial year 2024/2025.

Recommendations

The Culture and Leisure Overview and Scrutiny Committee is requested to:

1. Recommend a budget allocation of £454,422 is included in the Budget proposals for the financial year 2024/2025 to support the trading operation of LeisureSK Ltd.
2. Agree to receive and analyse the Business Plan for LeisureSK Ltd for financial year 2024/2025 at the scheduled meeting of the Overview and Scrutiny Committee on 9 January 2024.

Decision Information	
Does the report contain any exempt or confidential information not for publication?	Appendix One to this report is not for publication by virtue of paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 – financial information.
What are the relevant corporate priorities?	<ul style="list-style-type: none"> • Growth and our economy • Healthy and strong communities
Which wards are impacted?	Two or more wards

1. Background to the Report

- 1.1 The Council's Corporate Plan (2020 – 2023) sees the sustainability of public sport and leisure facilities as key to supporting the health of the district, tackling health inequalities and driving both local economic and social value to communities.
- 1.2 The Council has been providing financial support for LeisureSK Ltd in the form of a management fee since it began operating the Council's leisure facilities in January 2021. The management fee payment equates to the actual net deficit incurred in the operation of the service after taking into account the income generated and expenditure incurred.
- 1.3 For the current financial year a management fee of £500,000 was provided to LeisureSK Ltd to support the company with the increased costs in relation to staffing and utilities, the two largest areas of expenditure.
- 1.4 As part of the Council's annual budget setting process, and in consideration of the ongoing financial challenges being experienced by LeisureSK Ltd, it has been considered prudent at an early stage to undertake an assessment of the level of support which is likely to be required by the company for financial year 2024/2025.
- 1.5 To support this, the Board of Directors has considered a draft budget for LeisureSK Ltd and have agreed this is an accurate reflection of how the business is expected to perform in 2024/2025. The draft budget has identified the level of management fee which will be required and is attached to this report at **Exempt Appendix One**.
- 1.6 The budgeted bottom line for LeisureSK Ltd for 2024/2025 is a deficit of £454,422. Whilst it is disappointing to be budgeting for a deficit, this represents a significant improvement on the company's performance in the current financial year where LeisureSK Ltd are forecast to require a management fee payment in the sum of £738,942, although this has subsequently been offset by the receipt of £344,659 from the Swimming Pool Support Fund.

1.7 The budget for LeisureSK Ltd for 2024/2025 demonstrates a total increase in projected income of 5.5%, when compared to the current financial year. Paragraphs 1.8 to 1.12 demonstrate the significant changes in key income lines together with some of the increased costs the company is facing.

Fitness

1.8 Total fitness income is projected to grow by 9.6% as a result of a review of membership prices and predicted growth in membership numbers.

Swimming

1.9 Total swimming income is projected to grow by 6.6% when compared to the current financial year. Included within the income projections is a 10% price increase on casual swimming and pool hire fees which were agreed by the Board of Directors to offset the increased costs of running swimming pools. In addition, the Directors approved a £1 per month increase for Swim School lessons from September 2025.

Staffing Costs

1.10 Total staffing costs are budgeted to increase by 6.9% when compared to the current financial year. Although this seems high, there is an expectation the National Living Wage will increase by 7.1% in April 2024 which will impact the majority of employees.

1.11 The LeisureSK Ltd Board of Directors remain committed to mitigating the increased costs of operating the three leisure centres without impacting upon the levels of service delivery and customer experience. In the current year, this has included a management restructure which has directed resources to where they are needed operationally, rather than supporting a top-heavy management structure.

Utilities

1.12 Total utilities have been budgeted to reduce by 9.6% when compared to the current financial year. This has been calculated in line with the expectation that gas prices are likely to reduce by circa 20% in April 2024. However, the cost of utilities is still considerably higher than they were two years ago.

Funding Opportunities

1.13 Following the successful receipt of £344,659 from the Swimming Pool Support Fund, a further application to Phase 2 of the funding has been submitted in the sum of £647,957. If successful, this will provide a range of energy conservation improvements at all three leisure centres.

1.14 In addition to this, Council Officers, working in partnership with LeisureSK Ltd, have applied to the Public Sector Decarbonisation Scheme (Phase 3c). If successful, the resulting £4.08 million project will see the installation of an air source heat pump at Grantham Meres Leisure Centre, which will reduce carbon emissions.

Condition Survey Works

1.15 The Council are continuing to undertake the necessary repairs and maintenance as identified in the condition surveys which were undertaken in 2022. Planned remedial works include repairs to the roof at Bourne Leisure Centre which suffers from periodic rainwater leaks.

1.16 It is anticipated these works will take place in Spring 2024. However, until these works are procured, it is unclear whether a full or partial closure of Bourne Leisure Centre will be required. Should a closure be required, this would have a significant impact on the company's financial performance, and therefore it may be necessary to reprofile the budget and request additional financial support.

2. Key Considerations

2.1 The receipt of funding from Phase One of the Swimming Pool Support Fund will be utilised to offset the increased level of management fee it has been necessary for the Council to provide in financial year 2023/2024. It is currently unknown whether further funding streams will be available to support the operation of leisure centres in 2024/2025.

2.2 The Culture and Leisure Overview and Scrutiny Committee will receive a Business Plan for LeisureSK Ltd for financial year 2024/2025 at the meeting of the Committee scheduled for January 2024. This will set out the company's aims and direction for the next financial year and can be used by the Committee to monitor the ongoing performance of the company.

3. Other Options Considered

3.1 The main driver for the establishment of LeisureSK Ltd was to secure the ongoing provision of leisure across the district. Without the requested management fee of £454,422 for financial year 2024/2025, LeisureSK Ltd will suffer cashflow problems and may need to cease trading, resulting in the loss of leisure provision across South Kesteven. Therefore, the 'do nothing' option was discounted.

4. Reasons for the Recommendations

4.1 The recommendations within this report provide a budget framework to support LeisureSK Ltd. The management fee would be limited to the operational deficit of the company.

5. Background Papers

5.1 *LeisureSK Ltd Draft Accounts for 2021/2022 and consideration of a Management Fee for 2023/2024* – Report to Companies Committee, published 1 December 2022, available online at:
<https://moderngov.southkesteven.gov.uk/documents/s36255/LeisureSK%20Ltd%20-%20Accounts.pdf>

6. Appendices

6.1 **Exempt Appendix One** - The identified level of management fee which will be required.

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SOUTH
KESTEVEN
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COUNCIL



Leisure and Culture Overview and Scrutiny Committee

30 November 2023

Report of Debbie Roberts, Head of
Corporate Projects, Policy and
Performance

Corporate Plan Key Performance Indicators 2023/24 Mid-Year (Q2) Report

Report Author

Charles James, Policy Officer

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This Mid-Year update report outlines South Kesteven District Councils performance against the Corporate Plan Key Performance Indicators (KPIs) for the year of 2023/24.

Recommendations

1. Review and scrutinise the performance against the Corporate Plan Key Performance Indicators in relation to the delivery of the Corporate Plan priorities and outcomes.
2. Use this report to inform and support the ongoing work programme of the Committee.

Decision Information

Does the report contain any exempt or confidential information not for publication?	No
What are the relevant corporate priorities?	Growth and our economy Healthy and strong communities
Which wards are impacted?	All

1. Implications

Taking into consideration implications relating to finance and procurement, legal and governance, risk and mitigation, health and safety, diversity and inclusion, staffing, community safety, mental health and wellbeing and the impact on the Council's declaration of a climate change emergency, the following implications have been identified:

Finance and Procurement

- 1.1 The financial considerations where appropriate are referenced throughout this report.

Completed by: Alison Hall-Wright, Deputy Director (Finance and ICT) and Deputy S151 Officer

Legal and Governance

- 1.2 Regular reporting on agreed actions and measures is to be welcomed from a governance point of view, as it provides a transparent mechanism for reporting on performance.

Completed by: Graham Watts, Assistant Director (Governance and Public Protection) and Monitoring Officer

Risk and Mitigation

- 1.3 No significant risks have been identified.

Climate Change

- 1.4 The contents of this report do not have a direct impact on the Council's carbon emissions or the carbon emissions of the wider district. More detailed information

on carbon impact of individual projects or activities are outlined within the relevant project documentation or service plans.

2. Background to the Report

- 1.1 The South Kesteven Corporate Plan 2020-23 was approved by Council on 1 October 2020. It was agreed by the Council that actions, key performance indicators (KPIs) and targets would be developed by the relevant overview and scrutiny committee, which would retain oversight of the performance management arrangements at a strategic level. These actions and indicators were presented to this committee and agreed on 23 February 2021.
- 1.2 The Year End report for 2022/23 was presented to the Committee on 13 June 2023 and outlined the performance against the Corporate Plan for the previous financial year.
- 1.3 This report builds on these historical reports to provide an update on performance to the mid-year point of the 2023/24 financial year. It incorporates the changes recommended by the last KPI review to outline areas of the council's performance which are successful and to advise where challenges may lay.
- 1.4 2023/24 is the final year of monitoring these existing KPIs. A refresh of the Corporate Plan is currently underway. All Members have the opportunity to engage in the development of the new Corporate Plan, which will be adopted in the January 2024. To accompany the new Corporate Plan, a new suite of KPIs will be developed to reflect the priorities, ambitions and actions of the new Plan. These KPIs will be approved by each Committee and reporting will commence from April 2024.
- 1.5 Appendix A presents the overall performance against the four actions being presented in this session, as well as specific performance against the sub measures contained within those. Specific commentary is provided for each action, which is summarised as follows:
 - 4 of the actions are rated Green. These are actions which are on or above target as planned.
- 1.6 Nicola McCoy-Brown, Director of Growth and Culture has provided extended commentary on the KPI she is responsible for. Due to space limitations summaries of her remarks were included within the KPI Report (Appendix A). The commentary has been reproduced in full for the consideration of the Committee here:

1.7 Delivery of Growth of Our Economy 9 - Work with partners and attractions, to promote visitor economy and increase visitor spend in the District, including the adoption of a Tourism Strategic Framework.

- The team supported the 2023 Destination Lincolnshire Tourism Awards by encouraging Council-owned and South Kesteven based businesses directly involved in tourism, to submit an entry with the aim of progressing to the Visit England Awards. Stamford Arts Centre were awarded finalist status under the Arts, Culture and Heritage category. In February 2023, the Chief Executive of Destination Lincolnshire gave a presentation to the Culture & Visitor Economy Overview and Scrutiny Committee explaining how the national landscape of England's visitor economy is changing. 2023 has seen a new era of tourism and destination management begin, following the Destination Management Organisation (DMO) Review announcement, detailing a new Local Visitor Economy Partnerships (LVEPs) structure. Work is underway to support Destination Lincolnshire to become an accredited LVEP with Visit England, working more closely with Department for Culture, Media and Sport (DCMS).
- Discover South Kesteven is the tourism and visitor economy brand for South Kesteven District Council. The brand is well recognised and is supported by its website, publications, social media presence (TikTok, Facebook, Instagram and Twitter) and in-person events, such as the successful Visitor Economy Networking Event (reported in the previous quarter) and trade shows/business events. On 5 September 2023, the Culture and Leisure Overview and Scrutiny Committee (OSC) were provided with information on the progress and future promotional plans for the Hello SK app, along with early sight of an updated Discover South Kesteven website funded via the UK Shared Prosperity Fund (UKSPF). Since then, the website has been launched <https://www.discoversouthkesteven.com/> with its new blog page. STEAM (Scarborough Tourism Economic Activity Monitor) is an evaluation model used by the Council to assess the visitor economy. Details of the 2022 data will be presented to 30 November 2023 Culture and Leisure OSC. Key stats are:
 - A total of £218.18 million was generated within the local economy through visitor and tourism business expenditure South Kesteven received 3.15 million visitors during 2022
 - A total of 2,754 full time equivalent (FTE) roles are supported by the sector
 - 86.55% of visitors were day-trippers (2,722,000 people)
 - 13.45% of visitors stay overnight (423,400 people)

3. Key Considerations

- 1.1 The KPIs are produced and presented to each relevant scrutiny committee twice a year. These are the mid-year Q2 data.
- 1.2 There have been no areas of significant under performance identified in this report. There is commentary for each of the KPIs with an appropriate update from each area.
- 1.3 The new Corporate Plan is due to be adopted in January 2024. At that point, new KPIs will be approved by each Committee and collection of outcomes will commence from 1 April 2024.

4. Reasons for the Recommendations

- 1.1 This is a regular report where Members are invited to scrutinise and comment on performance.

5. Appendices

- 1.1 Appendix A – KPI Report: Leisure & Culture OSC Mid-Year (Q2) 2023/24

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Healthy & Strong Communities

Priority Number	Action	Responsible Scrutiny Committee	Priority Status	Action Status
1	Invest in sustainable, high quality leisure facilities across the district.	Finance & Economic	Reported Q2 2023-24	On Target
2	Embed the work of the SK Community Hub to support volunteering and the Voluntary & Community Sector.	Rural & Communities	Reported Q2 2023-24	On Target
3	Work with partners from all sectors to tackle health, employment, and other inequalities in areas of highest need.		No Longer Reported	Not Reported
4	Continue to work in partnership with the police and the community in tackling crime, investing in the CCTV service	Rural & Communities	Reported Q2 2023-24	On Target
5	Celebrate and enhance the rich history of the District.		Replaced with 13	Not Reported
6	Adopt a new Cultural Strategy for the District, including the local Arts, Events and Festivals programme.		Replaced with 13	Not Reported
7	Develop and adopt a Sport and Physical Activity Strategy.		Replaced with 14	Not Reported
8	Meet the Mental Health Challenge	Rural & Communities	Reported Q2 2023-24	On Target
9	Make best use of different funding sources to support the voluntary and cultural sector within the District.	Rural & Communities	Reported Q2 2023-24	Below Target
10	Protect our most vulnerable residents with robust safeguarding processes.	Rural & Communities	Reported Q2 2023-24	Significantly Below Target
11	Improve and invest in the local arts & cultural venues across the District.	Culture & Leisure	Reported Q2 2023-24	On Target
12	Promote and make progress against the Council's Equality Objectives	Rural & Communities	Reported Q4 2022-23	Not Reported
13	Review Arts services within the district with ambition to provide improved, efficient and accessible arts within the district.	Culture & Leisure	Reported Q2 2023-24	On Target
14	Develop and adopt a Sport and Physical Activity Strategy.	Culture & Leisure	Reported Q2 2023-24	On Target

Priority	Measured Biannually	Responsible Director Growth & Culture
<h1>Healthy And Strong Communities 11</h1>	On Target Current Status	Responsible Cabinet Member Culture & Visitor Economy

Action

Improve and invest in the local arts & cultural venues across the District.

Measure	Target	Achieved
1. Value of capital works carried out	Baseline + 10%	See Commentary
2. Maintaining properties to required standards	60% of action plan completed.	See Commentary

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Measure History	Q4 2021-22	Q2 2022-23	Q4 2022-23	Q2 2023-24
1. Value of capital works carried out	-	-	See Commentary	See Commentary
2. Maintaining properties to required standards	-	-	See Commentary	See Commentary

Commentary

A significant amount of capital works has been undertaken across Stamford Arts Centre and the Guildhall Arts Centre in Grantham. At Stamford Arts Centre this has included a full refurbishment of the customer toilets and the foyer area, which now houses a customer contact hub, providing online and telephone services for customers. Roof replacement works have recently been completed which has been a significant undertaking due to the specialist nature of the Collyweston roof slates. In relation to the Guildhall Arts Centre currently works are being undertaken to repair the roof to ensure the building is watertight and alleviate the periodic leaks in the building. There are also plans to replace the boiler system which is old and ineffective which will improve the energy performance of the building. Work is also currently ongoing to investigate improved signage at Bourne Corn Exchange to ensure this is commensurate with the building's identity and purpose.

Priority	Measured Biannually	Responsible Director Growth & Culture
<h1>Healthy And Strong Communities 13</h1>	On Target Current Status	Responsible Cabinet Member Culture & Visitor Economy

Action

Review Arts services within the district with ambition to provide improved, efficient and accessible arts within the district.

Measure	Target	Achieved
1. Staff review and restructure	2021/22	See Commentary
2. Review the programming and opening hours of the three centres in Grantham, Bourne and Stamford	2021/22	See Commentary
3. Identify potential future delivery models	2022/23	See Commentary
4. Develop new Cultural Strategy with clear action plan	2022/23	See Commentary

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Measure History	Q4 2021-22	Q2 2022-23	Q4 2022-23	Q2 2023-24
1. Staff review and restructure	Report to Scrutiny 05/04/2022	-	See Commentary	See Commentary
2. Review the programming and opening hours of the three centres in Grantham, Bourne and Stamford	Report to Scrutiny 05/04/2023	-	See Commentary	See Commentary
3. Identify potential future delivery models	Report to Scrutiny 05/04/2024	-	See Commentary	See Commentary
4. Develop new Cultural Strategy with clear action plan	Report to Scrutiny 05/04/2025	-	See Commentary	See Commentary

Commentary

The staffing restructure is now complete and delivered £300k savings. The role of Arts and Cultural Services Manager has been sucessfully recruited to via an internal promotion. Opening hours of the arts venues have been reviewed and changes made, the programming at the centres is kept under constant review to ensure the offer is attractive to customers and offers value for money. A longer term ambition for the arts service was to identify and assess any future potential delivery models for the arts service, an early assessment of options has been undertaken. A refreshed Cultural Strategy for the district was adopted by Cabinet in July 2023, including a set of key performance indicators which can be used to assess the implementation and success of the Cultural Strategy.

Priority	Measured Biannually	Responsible Director Growth & Culture
<h1>Healthy And Strong Communities 14</h1>	On Target Current Status	Responsible Cabinet Member Leisure

Action

Develop and adopt a Sport and Physical Activity Strategy.

Measure	Target	Achieved
1. Embed the sport and physical activity strategy	Ongoing	See Commentary
2. Develop a programme of outreach activities with the Council's leisure provider and other partners	Ongoing	See Commentary
3. Work with local partners to access funding available for projects	Ongoing	See Commentary

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Measure History	Q4 2021-22	Q2 2022-23	Q4 2022-23	Q2 2023-24
1. Embed the sport and physical activity strategy	Not Reported	New Measure	See Commentary	See Commentary
2. Develop a programme of outreach activities with the Council's leisure provider and other partners	Not Reported	New Measure	See Commentary	See Commentary
3. Work with local partners to access funding available for projects	Not Reported	New Measure	See Commentary	See Commentary

Commentary

The Council's Sport and Physical Activity Strategy was adopted in December 2021. Since that time a significant amount of progress has been made on the action plan, this progress being reported to Culture and Leisure OSC on a six monthly basis. Excellent working relationships have been developed with partners including LeisureSK Ltd, Active Lincolnshire and Lincs Inspire. Officers are working closely with LeisureSK Ltd to identify alternative ways to engage with residents outside of a traditional leisure centre setting. Recent successes have been the expansion of the healthy walks programme and the introduction of a fitness class in Deepings which was funded by Active Lincolnshire.

A Clean & Sustainable Environment

Priority Number	Action	Responsible Scrutiny Committee	Priority Status	Action Status
1	Reduce the Council's carbon footprint by at least 30% by 2030 and endeavour to become net-zero carbon as soon as viable before 2050.	Environment	Reported Q2 2023-24	On Target
2	Deliver the 'Big Clean' programme and maintain higher street standards.		No Longer Reported	Not Reported
3	Continue to innovate our approach to waste management to build on our strengths and maximise commercial and other opportunities.		Reported Q2 2023-24	On Target
4	Maintain and enhance our green areas across the District, aiming to secure Green Flag status for Queen Elizabeth Park, Dysart Park and other relevant areas.		Reported Q2 2023-24	On Target
5	Work proactively with Environment SK to deliver high quality services and maximise commercial opportunities.		Reported Q2 2023-24	On Target
6	Work with the Lincolnshire Waste Partnership to reduce waste and further improve recycling.		Reported Q2 2023-24	Not Reported
7	Recognise the changes in environmentally friendly modes of transport and seek to work with others to adapt required infrastructure		Reported Q2 2023-24	On Target
8	Explore opportunities to build on the success of the food waste pilot and ensure the service is sustainable.		No Longer Reported	Not Reported
9	Build a new, modern depot which is fit for the future.		Reported Q2 2023-24	On Target

Delivery of Growth of Our Economy

Priority Number	Action	Responsible Scrutiny Committee	Priority Status	Action Status
1	Delivery of the St Martins Park development scheme in Stamford.	Finance & Economic	Reported Q2 2023-24	Below Target
2	Regeneration of Grantham town centre, supported by the Future High Street (FHSF) bid and delivery of the Heritage Action Zone programme (HAZ).	Finance & Economic	Reported Q2 2023-24	Below Target
2	Regeneration of Grantham town centre, supported by the Future High Street (FHSF) bid and delivery of the Heritage Action Zone programme (HAZ).	Finance & Economic	Reported Q2 2023-24	On Target
3	Identify funding & other opportunities to support the development of the town centres of Bourne, The Deepings and Stamford, and apply lessons learnt from the Future High Street Fund & other initiatives.	Finance & Economic	Reported Q2 2023-24	On Target
4	Develop a package of measures to support the recovery of the local economy to safeguard local jobs wherever possible.	Finance & Economic	Reported Q2 2023-24	On Target
5	Review the scope and focus of InvestSK to maximise the support to local businesses and attract inward investment.		Removed as Complete	Not Reported
6	Continue to attract investment and encourage diverse businesses to the District and ensure appropriate land and property is available	Finance & Economic	Reported Q2 2023-24	On Target
7	Work with the education providers to increase opportunities for local learning and apprenticeships in the District.		No Longer Reported	Not Reported
8	In partnership with LCC bring forward housing and employment opportunities linked to the delivery of the Grantham Southern Relief Road.		No Longer Reported	Not Reported
9	Work with partners and attractions, to promote visitor economy and increase visitor spend in the District, including the adoption of a Tourism Strategic Framework.	Culture & Leisure	Reported Q2 2023-24	On Target
10	Support the roll out of improved broadband and other key infrastructure to support local businesses and rural areas.		No Longer Reported	Not Reported
11	Work closely with markets across South Kesteven and seek to maintain their viability.	Culture & Leisure	Reported Q4 2022-23	Not Reported

Priority ▲	Measured Quarterly	Responsible Director ▲ Growth & Culture
Delivery of Growth of Our Economy 9	On Target Current Status	Responsible Cabinet Member ▲ Culture & Visitor Economy

Action

Work with partners and attractions, to promote visitor economy and increase visitor spend in the District, including the adoption of a Tourism Strategic Framework.

Measure ▲	Target	Achieved
1. Number of newly engaged visitor economy attractions engaged	40	75
2. Increase in visitor economy spend	£113,344,000	£218,180,000
3. Adoption of Tourism Strategic Framework (Gross Value Added)	Adopted the Tourism Strategic Framework	On target

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Measure History ▲	Q2 2022-23	Q3 2022-23	Q4 2022-23	Q1 2023-24	Q2 2023-24
1. Number of newly engaged visitor economy attractions engaged	55	61	73	75	75
2. Increase in visitor economy spend	£168,630,000	£168,630,000	£168,630,000	£168,630,000	£218,180,000
3. Adoption of Tourism Strategic Framework (Gross Value Added)	On Target	On Target	Ongoing	On target	On target

Commentary

The team supported the 2023 Destination Lincolnshire Tourism Awards by encouraging Council-owned and South Kesteven based businesses directly involved in tourism, to submit an entry with the aim of progressing to the Visit England Awards. Stamford Arts Centre were awarded finalist status under the Arts, Culture and Heritage category. Work is underway to support Destination Lincolnshire to become an accredited Local Visitor Economy (LVEP) with Visit England, working more closely with Department for Culture, Media and Sport (DCMS). Discover South Kesteven is the tourism and visitor economy brand for South Kesteven District Council. The brand is well recognised and is supported by its website, publications, social media presence (TikTok, Facebook, Instagram and Twitter) and in-person events, such as the successful Visitor Economy Networking Event (reported in the previous quarter) and trade shows/business events. Since then, the website has been launched <https://www.discoversouthkesteven.com/> with its new blog page. STEAM (Scarborough Tourism Economic Activity Monitor) is an evaluation model used by the Council to assess the visitor economy. Details of the 2022 data will be presented to 30 November 2023 Culture and Leisure OSC.

Housing That Meets The Needs Of All Residents

Priority Number	Action	Responsible Scrutiny Committee	Priority Status	Action Status
1	Work in partnership with the housing market to stimulate housing growth.	Housing	Reported Q2 2023-24	Below Target
2	Work to reduce and prevent homelessness in our District.	Housing	Reported Q2 2023-24	Significantly Below Target
3	Increase the supply of high quality, sustainable Council houses.	Housing	Reported Q2 2023-24	Below Target
4	Undertake a Planning Review to improve performance and support local sustainable, high quality growth.	Housing	Reported Q1 2023-24	Not Reported
4	Undertake a Planning Review to improve performance and support local sustainable, high quality growth.	Housing	Reported Q2 2023-24	Not Reported
5	Undertake a Housing Review to provide the highest quality service possible to our tenants	Housing	Reported Q2 2023-24	Below Target
6	Work with housing associations and developers to ensure quality affordable housing is delivered.	Housing	Reported Q2 2023-24	On Target
7	Ensure the ambitions of the adopted Local Plan are met and a review framework is developed to deliver sustainable growth in the District.	Housing	Reported Q4 2022-23	Not Reported
8	Work with Homes England, the Ministry of Defence and other partners to develop holistic masterplans for the delivery of Grantham's Southern Urban Extension.		No Longer Reported	Not Reported
9	Ensure that major developments in South Kesteven are high quality, with sustainable, good design.	Housing	Reported Q2 2023-24	On Target
10	Prioritise bringing private sector empty properties back in to use.	Housing	Reported Q4 2022-23	Not Reported

A High Performing Council

Priority Number	Action	Responsible Scrutiny Committee	Priority Status	Action Status
1	Implement the Covid-19 Recovery Plan.		Removed as Complete	Not Reported
2	Deliver a balanced, sustainable financial plan over the medium term.	Finance & Economic	Reported Q4 2022-23	On Target
3	Undertake a Constitution review and implement outcomes.		Removed as Complete	Not Reported
4	Implement the findings of the Governance review across the Councils assets (including companies).		Removed as Complete	Not Reported
5	Develop a People Strategy (including a pay review) to support the retention and attraction of high quality staff.	Finance & Economic	Reported Q2 2023-24	On Target
6	Develop and implement commercial and transformation strategies to deliver additional net revenue benefit.		Removed as Complete	Not Reported
7	Undertake a fundamental review of the organisation to meet current and future needs.		Removed as Complete	Not Reported
8	Support the implementation of an IT investment roadmap to align future solutions with the Councils ambitions.		Removed as Complete	Not Reported
9	Embed an agile approach to working by building on the cultural and technological changes.		Removed as Complete	Not Reported
10	Deliver the ambitions of the Customer Experience Strategy.		No Longer Reported	Not Reported
11	Maximise the value of the Councils own spend by using local suppliers wherever practical.	Finance & Economic	Reported Q4 2022-23	Not Reported
12	Undertake an Asset Management Review.		Removed as Complete	Not Reported
13	Ensure that support packages are in place for ensuring the welfare of the districts most vulnerable residents and to enable small businesses to flourish in the district	Finance & Economic	Reported Q2 2023-24	On Target

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SOUTH
KESTEVEN
DISTRICT
COUNCIL



Culture and Leisure Overview and Scrutiny Committee

30 November 2023

Report of Councillor Ashley Baxter -
Deputy Leader of the Council and
Cabinet Member for Finance and
Economic Development

STEAM 2022 Report – Economic Impact of the Visitor Economy

Report Author

Nicola M^cOy-Brown – Director of Growth and Culture

✉️ nicola.mccoy-brown@southkesteven.gov.uk

Purpose of Report

The purpose of this report is two-fold. Firstly, to provide the Culture and Leisure Overview and Scrutiny Committee with an insight into the economic impact of the visitor economy in South Kesteven for 2022. Secondly, to collectively develop an understanding of the wider visitor economy landscape to identify how the Council can support the continued recovery of the sector, whilst maintaining long-term resilience amongst key stakeholders.

Recommendation

It is recommended the Culture and Leisure Overview and Scrutiny Committee:

- 1. Examines the Scarborough Tourism Economic Accommodation Model (STEAM) data for 2022**
- 2. Consider the wider visitor economy landscape to identify how the Council could support the continued recovery of the sector, whilst maintaining long-term resilience amongst businesses and key stakeholders.**

Decision Information	
Does the report contain any exempt or confidential information not for publication?	No
What are the relevant corporate priorities?	Growth and our Economy
Which wards are impacted?	All

1. Implications

Taking into consideration implications relating to finance and procurement, legal and governance, risk and mitigation, health and safety, diversity and inclusion, safeguarding, staffing, community safety, mental health and wellbeing and the impact on the Council's declaration of a climate change emergency, the following implications have been identified:

Finance and Procurement

1.1 There are no financial implications associated with this report.

Completed by: Alison Hall-Wright, Deputy Director (Finance & ICT) and Deputy S151 Officer

Legal and Governance

1.2 There are no significant legal and governance implications arising from this report which are not already referenced in the body of the report.

Completed by: Graham Watts, Assistant Director (Governance and Public Protection) and Monitoring Officer

Climate Change

1.4 Sustainability is increasingly important for people when choosing where to travel for both business and leisure. Should a Visitor Economy Strategy be developed in the future, supporting the industry to build a sustainable tourism sector, promote green tourism and considering low carbon travel, warrants consideration.

Completed by: Serena Brown, Sustainability and Climate Change Officer

2. Background to the Report

2.1 The Corporate Plan 2020-2023 sets out the Council's vision to '*be the best district in which to live, work and visit*'. The visitor economy allows South Kesteven to

showcase its unique identity to spearhead local growth and deliver wider benefits. From helping young people and parents into work, to supporting local businesses and creating the conditions to realise the Council's vision.

- 2.2 The Council acquires its tourism and visitor economy data and performance information through the STEAM (Scarborough Tourism Economic Activity Monitor) model. The STEAM model is produced by Global Tourism Solutions and is a tourism economic impact modelling process which approaches the measurement of tourism from the bottom up, through its use of local supply side data and tourism performance and visitor survey data collection.
- 2.3 On 6 September 2022, Members of the (then) Culture and Visitor Economy Overview and Scrutiny Committee received a presentation on the STEAM report, purchased by South Kesteven District Council for the period to March 2021. Members expressed a desire that once subsequent years data was available, this would be brought to Committee.
- 2.4 STEAM quantifies the local economic impact of tourism, from both staying and day visitors, through analysis and use of a variety of inputs including: visitor attraction numbers, tourist accommodation bedstock, events attendance, occupancy levels, accommodation tariffs, macroeconomic factors, visitor expenditure levels, transport use levels and tourism-specific economic multipliers. The STEAM model uses this set of data sets to generate a series of impact analyses, relating to four key visitor types:
 - Staying in Serviced Accommodation
 - Staying in Non-Serviced Accommodation
 - Staying with Friends and Relatives (SFR)
 - Tourist Day Visitors
- 2.5 Within the model, the above visitor types are broken down further into sub-categories of accommodation use and, where required, subtypes of day or SFR visitor. This allows the model to ensure its outputs reflect the differences in supply and consumption of tourism services between different types of tourism business. It carries a further benefit in that the outputs relating to specific subcategories of visitor can be presented in isolation, excluded or combined to reflect specific reporting needs.
- 2.6 STEAM is the preferred model assessing the visitor economy of authorities across Greater Lincolnshire and the East Midlands. Every Lincolnshire district authority, bar South Holland, commissioned a STEAM report in 2022. Where possible these reports plus Rutland, have been used to situate South Kesteven's performance in the regional context and to highlight shared trends.
- 2.7 The 2022 datasets (found in full at **Appendix A** and **an interactive version at Appendix B**) are of particular interest given they cover the immediate post-

pandemic period, providing an indicator of the sectors recovery, strength and resilience, and suggesting how consumer behaviour has changed post-pandemic. In this report and accompanying briefing, the financial data throughout is in 2022 prices to enable a more accurate comparison with the pre-pandemic period.

2.8 As the 2022 STEAM datasets runs to 59 pages, a summary document can be found at **(Appendix C)** giving a precis of key highlights. The key statistics for South Kesteven from STEAM 2022 are:

- A total of £218.18 million was generated within the local economy through visitor and tourism business expenditure. The sector is 98.52% of its pre-pandemic size (2019 adjusted to 2022 prices). This is the second strongest recovery in Lincolnshire.
- South Kesteven received 3.15 million visitors during 2022, a decline of 9% on 2019. Overall visitor spending is up 8.27% on 2019.
- A total of 2,754 full time equivalent (FTE) roles are supported by the sector.
- 86.55% of visitors were day-trippers (2,722,000 people). Day visitor numbers are down 11.13% on 2019. Day trippers are responsible for 54% of the total visitor economy, generating £118.89 million with an average visitor spend of £43.68. Average visitor spend has essentially not changed since 2019 (0.02% increase).
- 13.45% of visitors stay overnight (423,400 people). Staying visitor number are up 7.76% on 2019. Staying visitors are responsible for 46% of the total visitor economy, generating £99.280 million with an average visitor spend of £234.51, up 5.06% on 2019.
- The spending and visitor habits of staying visitors vary depending on accommodation choice. Visitors choosing non-serviced accommodation represent 2% of all visitors yet contribute 14.76% of the visitor economy. These are the most economically valuable visitors with an average spend per visit of £471.60, up 9.08% from 2019. 68,300 visitors chose to stay in non-serviced accommodation in 2022, a 43.49% increase on 2019.

3.2 There are four overarching trends contained in the STEAM 2022 reports which are largely replicated across Greater Lincolnshire as follows:

- **The visitor economy is resilient.** Following the pandemic, the visitor economy has bounced back to, although yet to exceed pre-pandemic (2019) levels. South Kesteven has seen the second strongest recovery in Greater Lincolnshire, behind East Lindsey.

- **Overall visitor numbers are down.** For South Kesteven, excluding the pandemic period of 2020 and 2021, total visitors are at the lowest level since 2014, down 9% on 2019. This trend is observed across Greater Lincolnshire. South Kesteven had the second lowest fall in visitors, again behind East Lindsey. For Greater Lincolnshire the overall fall was 13.04%. The visitor drop is concentrated amongst day visitors, who compose the vast majority of visitors in each authority (86.55% in South Kesteven). Falls in day visitors range from 11.13% in South Kesteven to 21.98% in Rutland. Greater Lincolnshire 15.33%.
- **Visitors are spending more.** Overall Visitor spending is up 8.27% on 2019 in South Kesteven, a trend mirrored across Greater Lincolnshire. The average visitor spend per visitor in South Kesteven was £69.37, the second lowest in Greater Lincolnshire. Spending habits vary significantly depending on length of stay and choice of accommodation. The growth in visitor spending is being driven by staying visitors. Day spending has remained essentially static. Visitors choosing non-serviced accommodation are the most valuable economically. Such visitors in South Kesteven spent an average of £471.60 over the duration of their stay, up 9.08%. South Kesteven had the second highest spenders of visitors in this category, behind Rutland (£521.95).
- **Staying visitors have increased.** Whilst overall numbers are down, visitors seeking accommodation are up 7.76% in South Kesteven. In terms of staying visitor numbers and economic impact, 2022 was a record-breaking year for South Kesteven (2011-2022). This upwards trend was observed in all available comparator areas bar Rutland (1.38% decline). South Kesteven has seen extraordinary growth in the number of visitors choosing non-serviced accommodation, up 43% on 2019 (Greater Lincolnshire 6.52%).

3. Key Considerations

- 3.1 The STEAM model is recognised nationally as the most accurate and comprehensive form of reporting tourism and visitor economy data. In specific regard to how this data is procured and presented, there are no realistic other options for consideration.
- 3.2 The Council should be making data-led decisions anchored in the needs of the tourism and visitor economy sector to deliver service improvements. It is for this reason, the decision to do nothing was discounted.

4. Other Options Considered

4.1 For some time, there has been interest in bringing forward a visitor economy strategy and accompanying action plan. Building upon the STEAM dataset, the new Corporate Plan and Economic Development Strategy (both of which are currently under development) and coupled with the appointment of a new Head of Economic Development & Inward Investment in the new year, the opportunity presents itself in bringing this ambition to reality later in 2024.

5. Reasons for the Recommendation

5.1 To help Members of the Culture and Leisure Overview and Scrutiny Committee to be fully informed on the key performance data of the local visitor economy and to understand the trends within the sector and wider region post-pandemic.

5.2 The Council has a role as a leader, visionary and advisor to provide the vision and ambition for the visitor economy sector. As both the Corporate Plan and Economic Development Strategy approach publication, consideration needs to be given to how the Council could support the short-term recovery of the sector, whilst maintaining long-term resilience amongst businesses and key stakeholders.

6. Background Papers

6.1 *STEAM Data – Economic Impact of the Visitor Economy* – Report to Culture and Visitor Economy Overview and Scrutiny Committee, published 6 September 2022 and available online via:
<https://moderngov.southkesteven.gov.uk/documents/s35437/STEAM%20-%20Economic%20Impact.pdf>

6.2 The full STEAM reports of other districts in Greater Lincolnshire can be accessed online via Visit Lincolnshire Business:
<https://business.visitlincolnshire.com/insights/research-and-reports/>

7. Appendices

7.1 **Appendix A** - South Kesteven STEAM Report for 2022

7.2 **Appendix B (Issued to Members via email)** – Interactive version of the South Kesteven STEAM Report for 2022

7.3 **Appendix C** - Summary of the key points from the longer STEAM Visitor Data for 2022



STEAM REPORT FOR 2011-2022 - FINAL

Final

South Kesteven District Council

Global Tourism Solutions (UK) Ltd

71 Heol Gwys

Upper Cwmtwrch

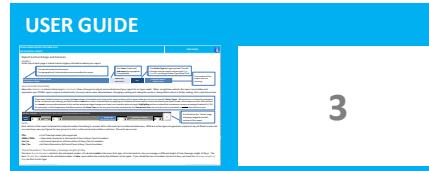
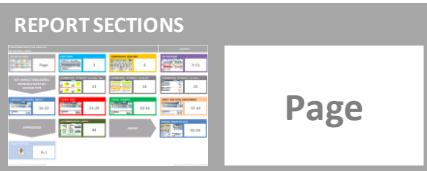
Swansea

SA9 2XH

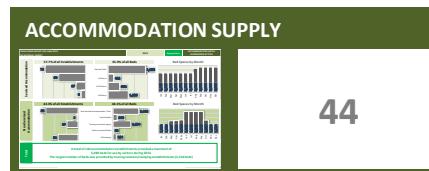
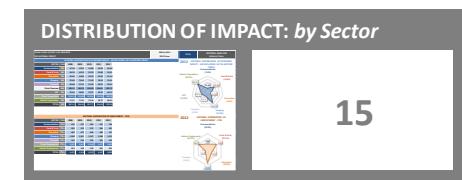
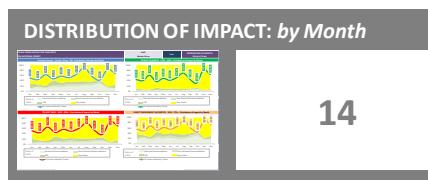
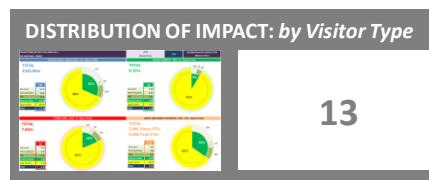
Telephone: 0798 445 5388

Email: cathryn.j@gtsuk.co.uk

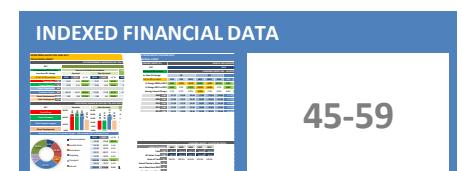
Website: www.globaltourismsolutions.co.uk



KEY IMPACT MEASURES:
MONTHLY DATA BY
VISITOR TYPE



ANNEX





Report Section Design and Features

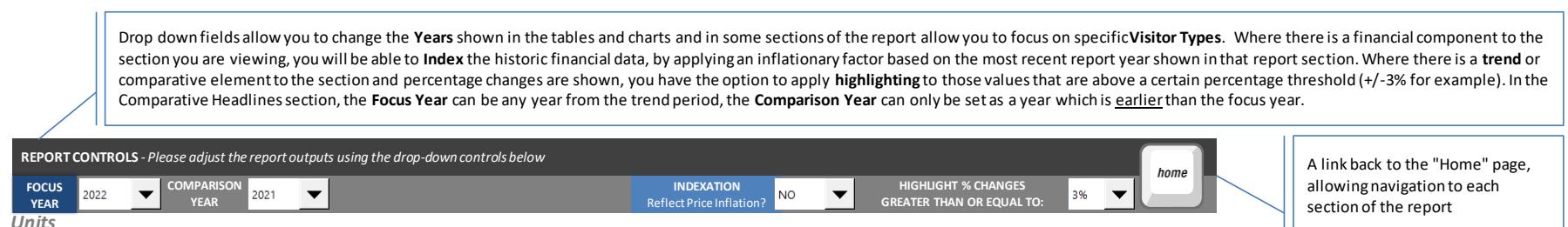
Headers

At the top of each page is a band containing key information about your report



User Controls (Excel File)

Above the **Headers** is a band containing **User Controls**, these allow you to adjust various features of your report to suit your needs. When using these controls the report recalculates and represents your STEAM report outputs automatically. You may notice some delay between changing a setting and seeing the result, or being able to adjust a further setting, this is entirely normal.



Each section of the report automatically adjusts number formatting to present data in the most easily understandable way. Different visitor types can generate impacts at very different scales and as a result you may see figures for one group of visitors in thousands and another in millions. The units we use are:

FTEs	= Full Time Equivalent jobs supported
£000s / 000s	= thousands of pounds or thousands of tourist days / tourist numbers
£m / m	= millions of pounds or millions of tourist days / tourist numbers
£bn / bn	= billions of pounds or billions of tourist days / tourist numbers

Visitor Numbers / Visitor Days / Average Length of Stay

The term **Visitor Numbers** relates to the estimated number of individual **visits** to the area. Each type of visitor tends to stay, on average, a different length of time (Average Length of Stay). The term **Visitor Days** relates to the estimated number of **days** spent within the area by the different visitor types. If you divide the visitor days by visitor numbers, you have the **Average Length of Stay** for that Visitor Type

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL										Comparing 2022 and 2021 All £'s Historic Prices			COMPARATIVE HEADLINES								
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2021 - IN HISTORIC PRICES																					
KEY		Key Performance Indicators by Type of Visitor - Comparing 2022 & 2021 - In Historic Prices																			
An increase of 3% or more		Staying in Paid Accommodation							Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types			
Less than 3% change		Serviced			Non-Serviced			SFR			All Staying Visitors			Day Visitors			All Visitor Types				
A Fall of 3% or more		2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %		
Visitor Days	M	0.268	0.168	59.9%	0.475	0.391	21.7%	0.508	0.442	15.0%	1.252	1.000	25.1%	2.722	2.408	13.1%	3.974	3.408	16.6%		
Visitor Numbers	M	0.141	0.088	60.9%	0.068	0.057	20.0%	0.214	0.167	28.2%	0.423	0.312	35.9%	2.722	2.408	13.1%	3.145	2.719	15.7%		
Direct Expenditure	£M																163.77	126.33	29.6%		
Economic Impact	£M	37.78	22.83	65.5%	32.21	24.66	30.6%	29.30	23.63	24.0%	99.29	71.12	39.6%	118.89	97.51	21.9%	218.18	168.63	29.4%		
Direct Employment	FTEs	805	576	39.6%	332	273	21.7%	227	194	17.1%	1,364	1,043	30.8%	907	791	14.8%	2,271	1,834	23.9%		
Total Employment	FTEs																2,754	2,232	23.4%		
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2021 - IN HISTORIC PRICES																					
KEY		Serviced			Non-Serviced			SFR			All Staying Visitors			Day Visitors			All Visitor Types				
Visitor Days	80.0%	59.9%	60.9%	65.5%	40.0%	21.7%	20.0%	30.6%	21.7%	30.0%	15.0%	28.2%	24.0%	50.0%	25.1%	35.9%	39.6%	20.8%	40.0%		
Visitor Numbers	60.0%	59.9%	60.9%	65.5%	39.6%	21.7%	20.0%	30.6%	21.7%	20.0%	15.0%	28.2%	24.0%	40.0%	25.1%	35.9%	39.6%	20.8%	40.0%		
Total Economic Impact	40.0%	60.0%	59.9%	60.9%	39.6%	21.7%	20.0%	30.6%	21.7%	10.0%	0.0%	15.0%	24.0%	30.0%	25.1%	35.9%	39.6%	20.8%	40.0%		
Direct Employment	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices										Sectors								Sectoral Distribution of Employment - FTEs			
										2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %
										21.00	14.11	48.9%	Accommodation	794	603	31.6%	Accommodation	26.1%	35.0%	35.0%	
										45.02	35.08	28.4%	Food & Drink	515	426	20.9%	Food & Drink	11.1%	11.1%	11.1%	
										18.24	14.19	28.5%	Recreation	253	209	21.1%	Recreation	11.1%	11.1%	11.1%	
										56.82	44.95	26.4%	Shopping	593	498	19.1%	Shopping	11.1%	11.1%	11.1%	
										22.70	18.01	26.1%	Transport	116	98	18.8%	Transport	11.1%	11.1%	11.1%	
										163.77	126.33	29.6%	TOTAL DIRECT	2,271	1,834	23.9%	TOTAL	2,754	2,232	23.4%	
										54.40	42.30	28.6%	Indirect	483	398	21.2%	Direct Employment Categories	5.1%	11.1%	11.1%	
										218.18	168.63	29.4%	TOTAL	2,754	2,232	23.4%	Direct Employment Categories	35.0%	22.7%	22.7%	
Direct Expenditure Categories																					

Unindexed Key Measures by Year and Visitor Type for the Period 2011 to 2022

Visitor Types: *Total*

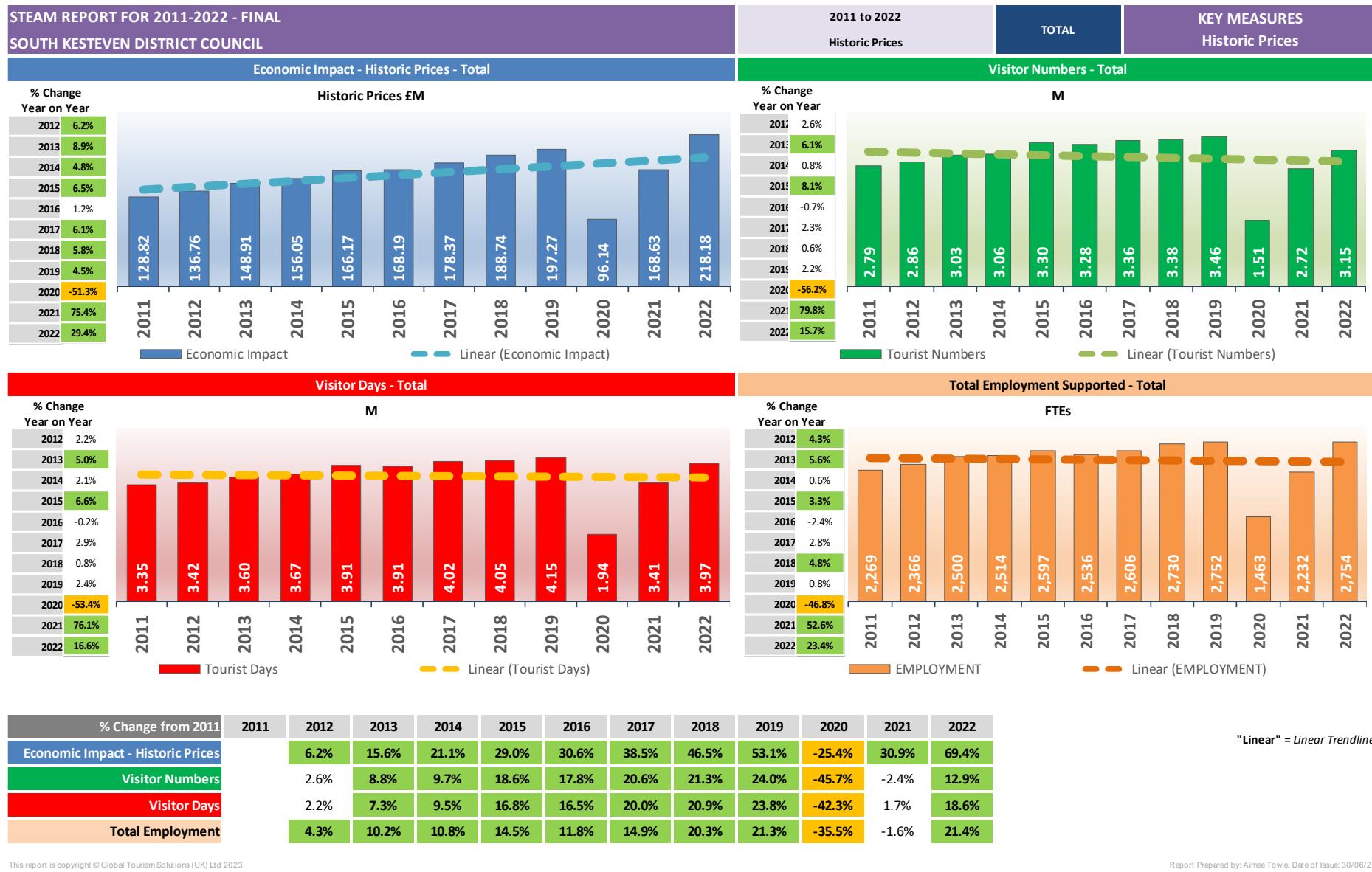
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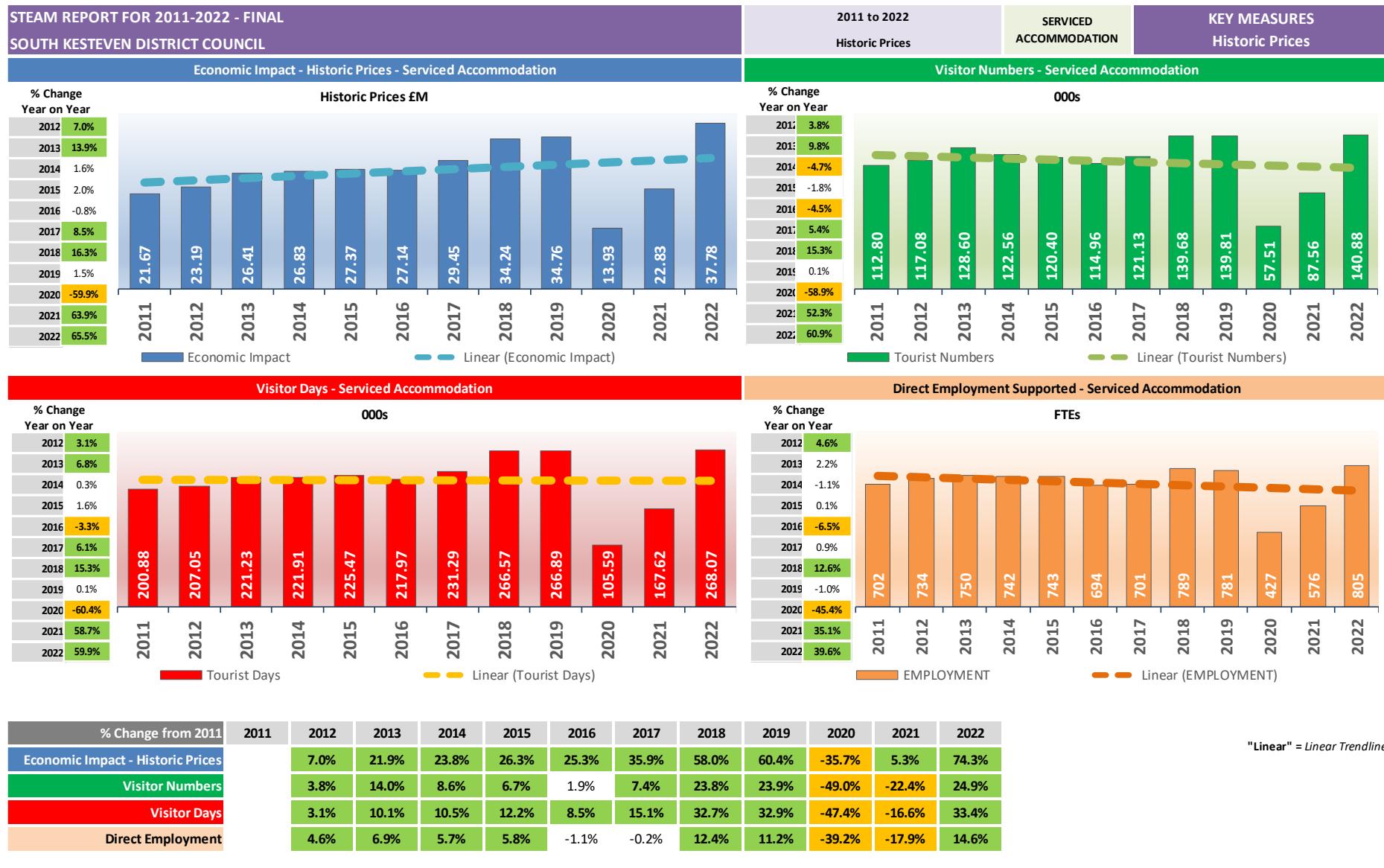
Non-Serviced Accommodation

SFR

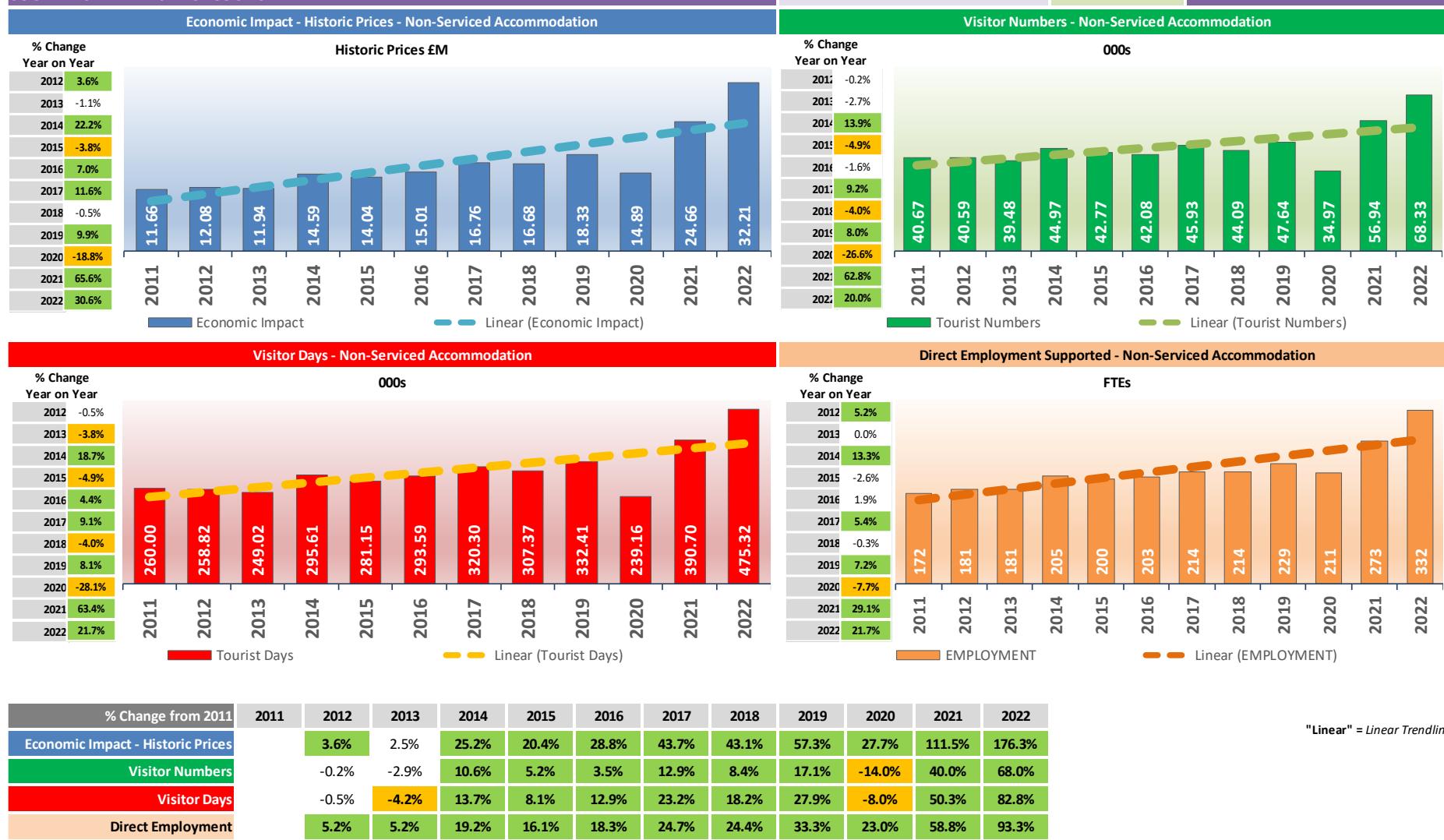
Staying Visitor

Day Visitor

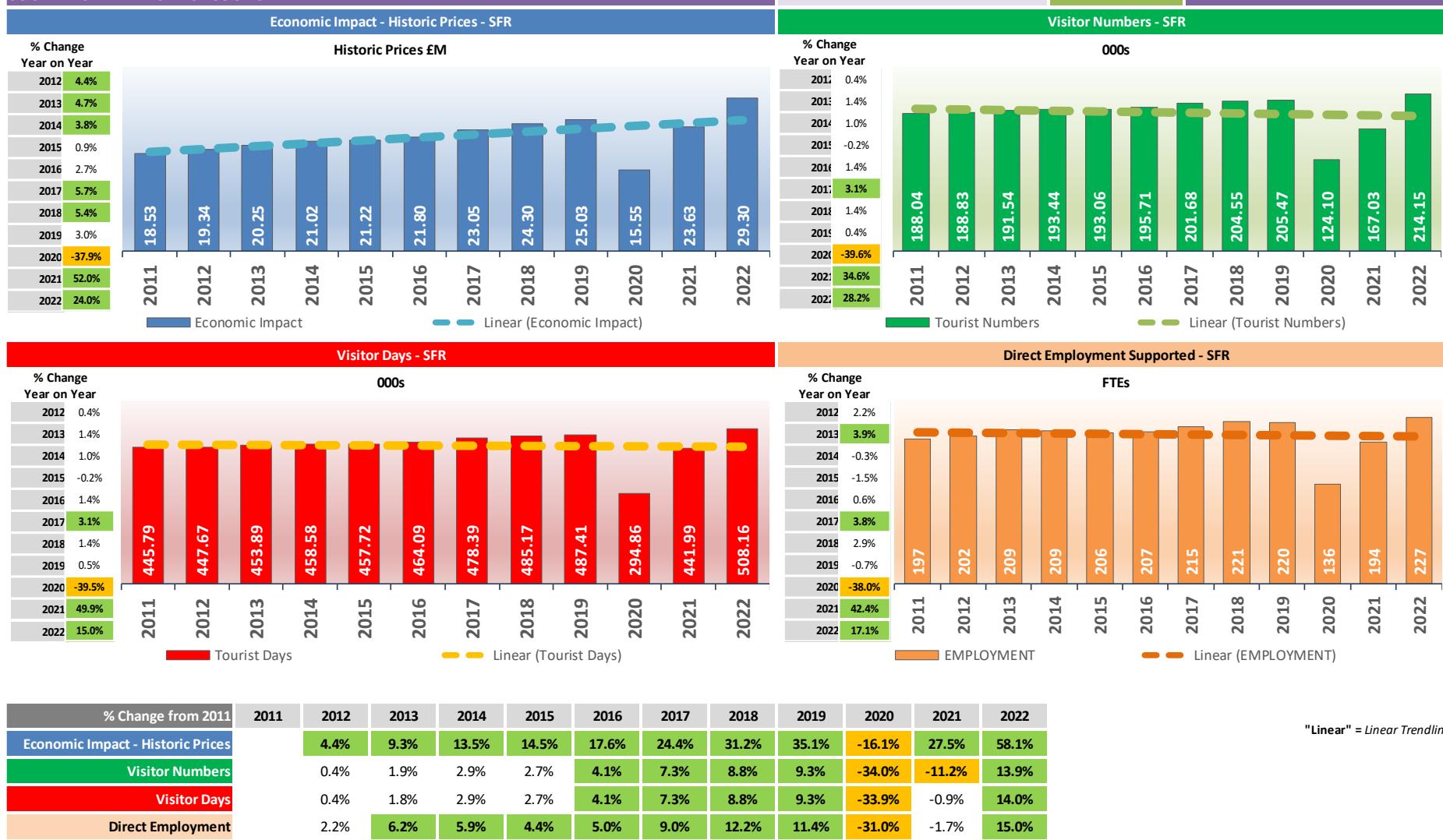


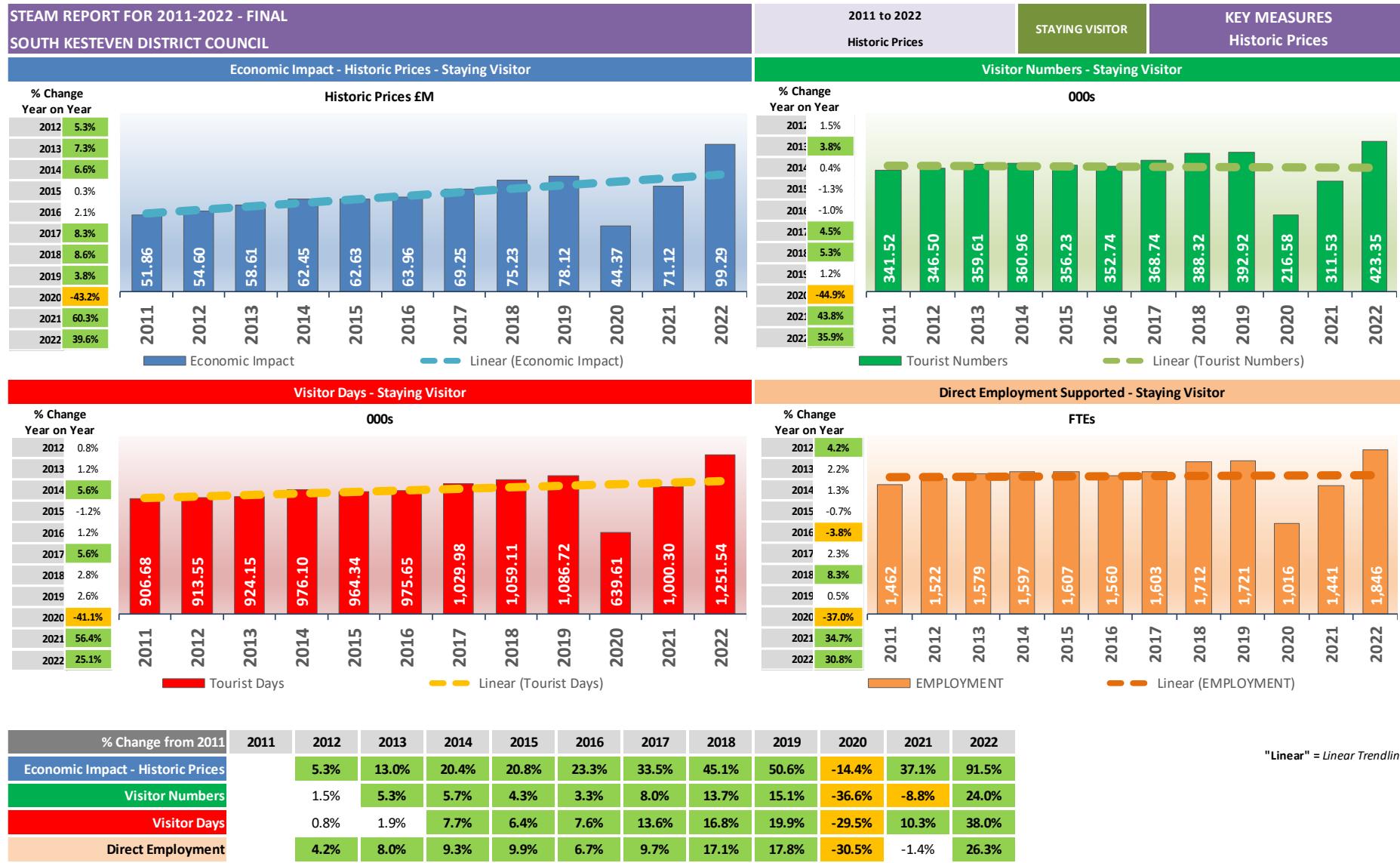


STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL

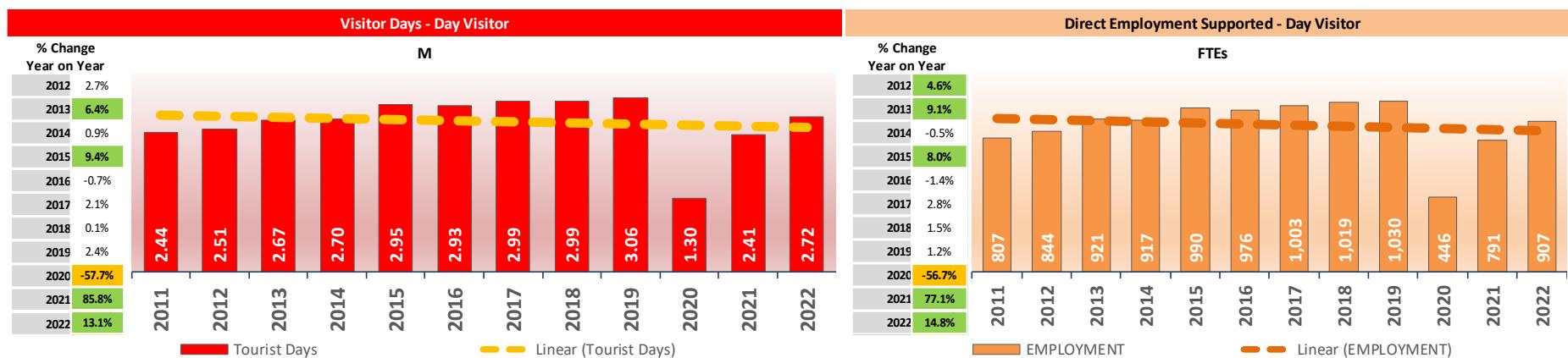


STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL





STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL



% Change from 2011	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Economic Impact - Historic Prices		6.8%	17.3%	21.6%	34.5%	35.4%	41.8%	47.5%	54.8%	-32.7%	26.7%	54.5%
Visitor Numbers		2.7%	9.3%	10.2%	20.6%	19.8%	22.3%	22.4%	25.3%	-47.0%	-1.5%	11.4%
Visitor Days		2.7%	9.3%	10.2%	20.6%	19.8%	22.3%	22.4%	25.3%	-47.0%	-1.5%	11.4%
Direct Employment		4.6%	14.1%	13.5%	22.6%	20.9%	24.3%	26.2%	27.6%	-44.7%	-2.1%	12.4%

"Linear" = Linear Trendline

Distribution of Key Impacts by Visitor Type, Month and Sector for the Period 2011 to 2022

Visitor Types: *Total*

Serviced Accommodation

Non-Serviced Accommodation

SFR

Staying Visitor

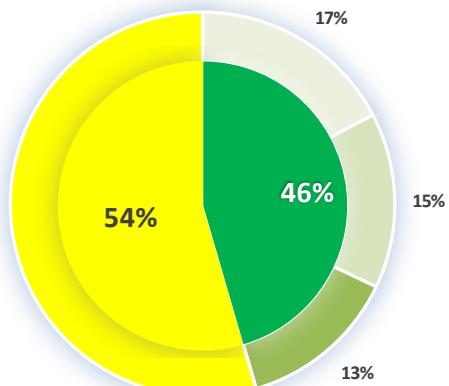
Day Visitor

STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL

Economic Impact - Historic Prices - £M - Share of Total

TOTAL
£218.18m

	£M
Serviced	37.78
Non-Serviced	32.21
SFR	29.30
Staying Visitor	99.29
Day Visitor	118.89
Total	218.18



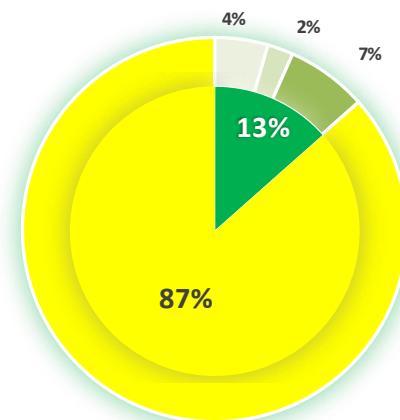
2022
Historic Prices

TOTAL

Visitor Numbers - 2022 - M - Share of Total

TOTAL
3.15m

	M
Serviced	0.14
Non-Serviced	0.07
SFR	0.21
Staying Visitor	0.42
Day Visitor	2.72
Total	3.15

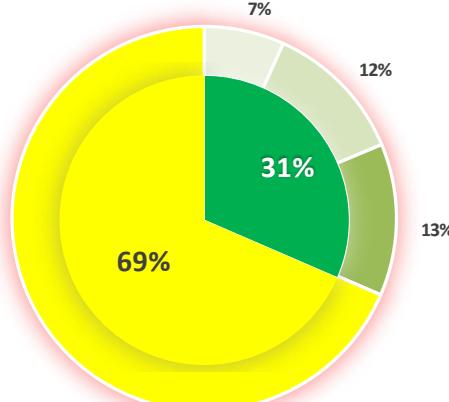


105

Visitor Days - 2022 - M - Share of Total

TOTAL
3.97m

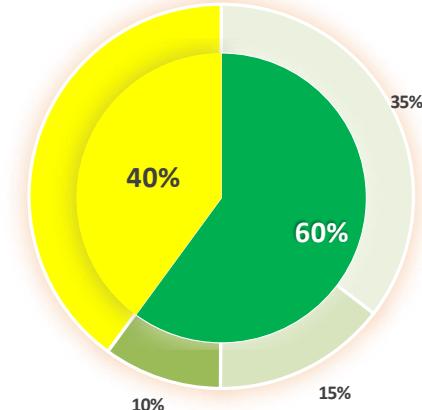
	M
Serviced	0.27
Non-Serviced	0.48
SFR	0.51
Staying Visitor	1.25
Day Visitor	2.72
Total	3.97



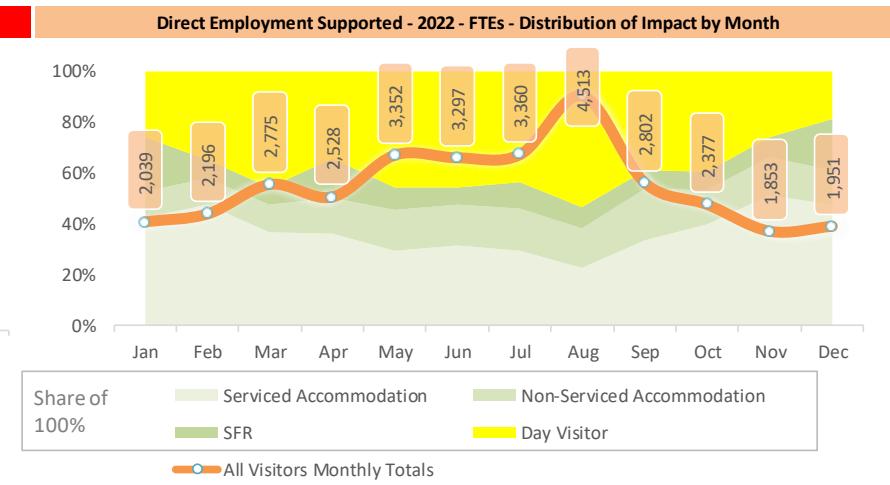
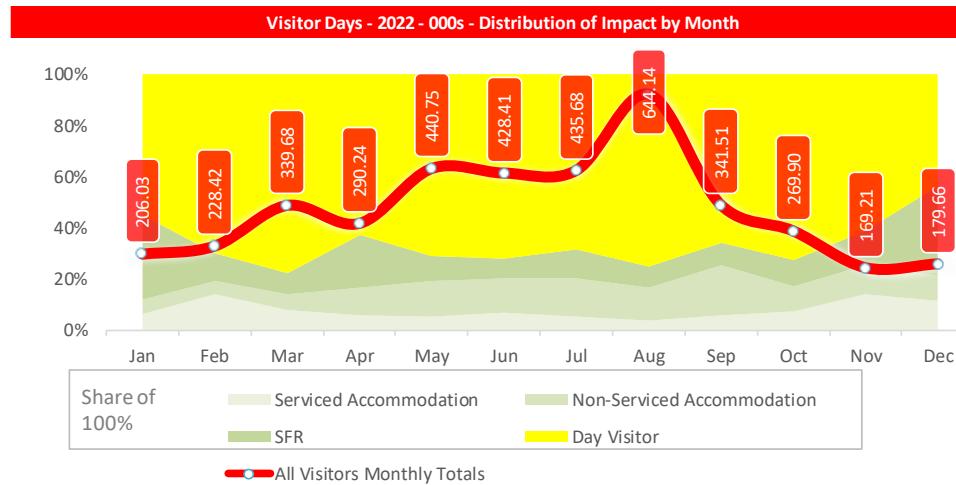
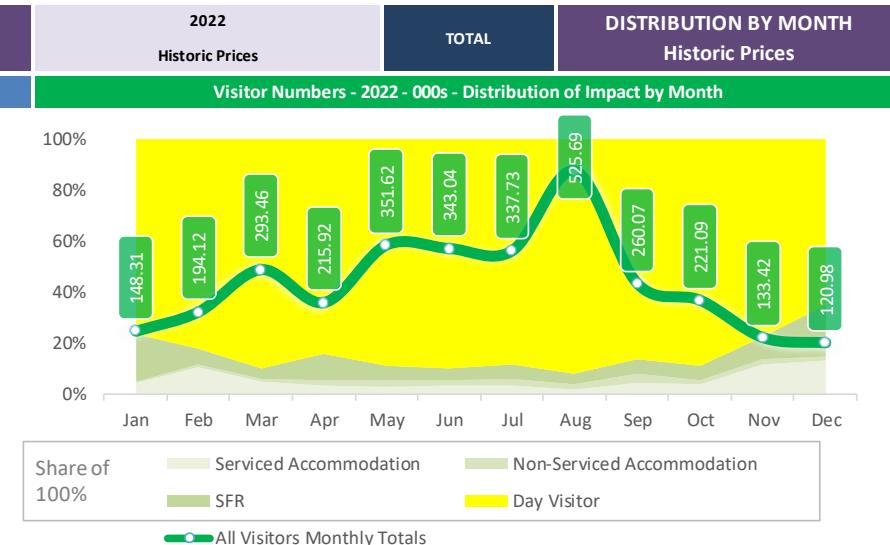
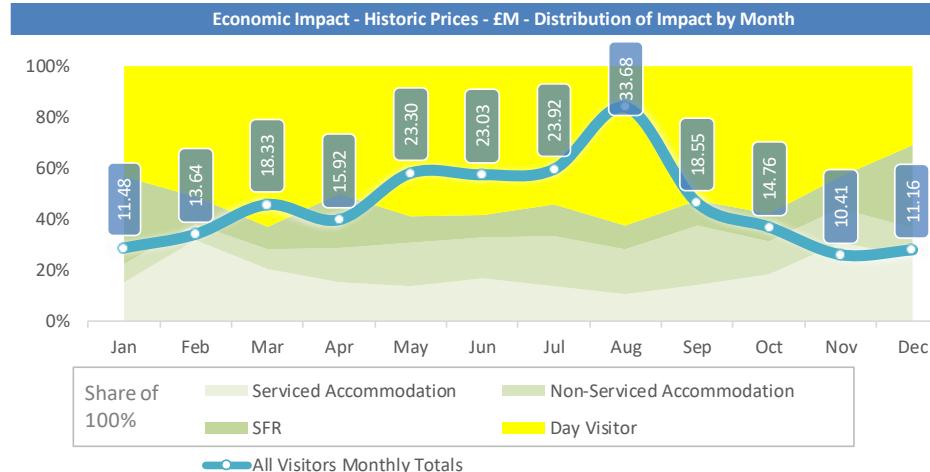
Direct Employment Supported - 2022 - FTEs - Share of Total

TOTAL
2,271 Direct FTEs
2,754 Total FTEs

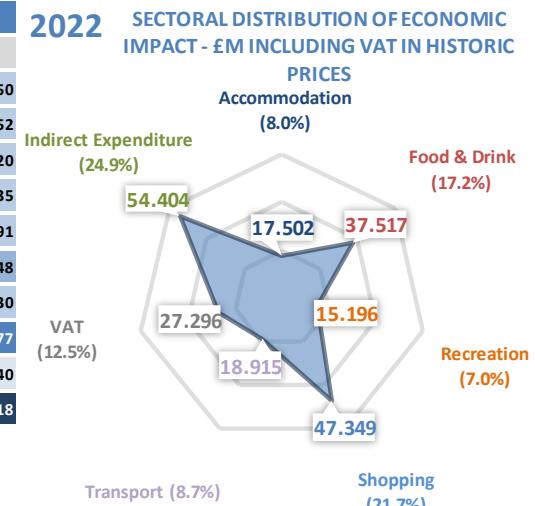
	FTEs
Serviced	805
Non-Serviced	332
SFR	227
Staying Visitor	1,364
Day Visitor	907
Total	2,271



STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL



STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL												2011 to 2022	TOTAL	SECTORAL ANALYSIS
												Historic Prices	Historic Prices	
SECTORAL DISTRIBUTION OF ECONOMIC IMPACT - £M INCLUDING VAT IN HISTORIC PRICES												2022	SECTORAL DISTRIBUTION OF ECONOMIC IMPACT - £M INCLUDING VAT IN HISTORIC PRICES	
SECTOR / YEAR	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022		
Accommodation	£M	8.929	9.510	10.83	11.15	11.15	11.39	12.38	13.76	13.90	7.553	11.80	17.50	Accommodation (8.0%)
Food & Drink	£M	22.37	23.73	25.67	26.96	28.74	29.04	30.78	32.57	34.14	17.63	29.35	37.52	Food & Drink (17.2%)
Recreation	£M	9.030	9.583	10.38	10.93	11.69	11.80	12.51	13.24	13.90	7.078	11.87	15.20	Recreation (7.0%)
Shopping	£M	29.00	30.80	33.44	35.01	37.82	38.21	40.33	42.32	44.40	21.07	37.61	47.35	Shopping (21.7%)
Transport	£M	11.34	12.02	12.98	13.70	14.68	14.88	15.74	16.46	17.31	8.544	15.06	18.91	Transport (8.7%)
Direct Revenue	£M	80.67	85.64	93.30	97.74	104.08	105.32	111.73	118.35	123.65	61.87	105.69	136.48	Indirect Expenditure (24.9%)
VAT	£M	16.13	17.13	18.66	19.55	20.82	21.06	22.35	23.67	24.73	10.19	20.64	27.30	VAT (12.5%)
Direct Expenditure	£M	96.80	102.77	111.96	117.29	124.90	126.39	134.08	142.01	148.37	72.06	126.33	163.77	
Indirect Expenditure	£M	32.02	33.99	36.95	38.75	41.27	41.80	44.30	46.73	48.89	24.08	42.30	54.40	
TOTAL	£M	128.82	136.76	148.91	156.05	166.17	168.19	178.37	188.74	197.27	96.14	168.63	218.18	



SECTORAL DISTRIBUTION OF EMPLOYMENT - FTES													
SECTOR / YEAR	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	
Accommodation	FTEs	655	688	694	693	693	651	648	716	716	477	603	794
Food & Drink	FTEs	422	439	471	475	495	489	509	526	531	266	426	515
Recreation	FTEs	207	215	231	234	244	241	251	259	262	130	209	253
Shopping	FTEs	499	519	559	563	593	587	608	623	630	290	498	593
Transport	FTEs	96	99	106	108	113	112	116	119	120	58	98	116
Direct Employment	FTEs	1,878	1,960	2,062	2,073	2,138	2,081	2,133	2,243	2,260	1,221	1,834	2,271
Indirect Employment	FTEs	390	406	438	441	459	455	473	488	492	242	398	483
TOTAL	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754



Unindexed Economic Impact by Month, Year and Visitor Type for the Period 2011 to 2022

Visitor Types: *Total*

Serviced Accommodation

Non-Serviced Accommodation

SFR

Staying Visitor

Day Visitor

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022 Historic Prices		TOTAL		ECONOMIC IMPACT Historic Prices				
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		TOTAL																	
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER				
Less than 3% change		Q1			Q2			Q3			Q4								
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC		Q1	Q2	Q3	Q4	
% Change 2011 to 2022		52.5%	60.3%	111.6%	49.6%	74.4%	77.7%	62.7%	75.4%	65.0%	61.8%	60.4%	74.4%	69.4%	Annual Change	75.9%	68.4%	68.7%	65.0%
% Change 2021 to 2022		334.7%	239.2%	190.6%	130.5%	40.1%	9.4%	7.4%	-1.0%	-5.4%	-4.6%	7.6%	11.3%	29.4%		235.0%	39.6%	0.3%	3.3%
Average Annual Change		4.8%	5.5%	10.1%	4.5%	6.8%	7.1%	5.7%	6.9%	5.9%	5.6%	5.5%	6.8%	6.3%		6.9%	6.2%	6.2%	5.9%
2011	£M	7.528	8.512	8.664	10.64	13.36	12.96	14.70	19.21	11.24	9.121	6.489	6.397	128.82		24.70	36.96	45.15	22.01
2012	£M	7.912	9.107	9.857	10.45	13.36	14.34	16.02	21.19	11.95	9.146	6.945	6.477	136.76		26.88	38.15	49.17	22.57
2013	£M	8.255	10.43	11.64	10.80	15.79	14.48	17.30	23.47	12.23	9.591	7.654	7.273	148.91	8.9%	30.32	41.07	53.00	24.52
2014	£M	8.158	10.38	12.96	12.06	16.47	15.27	18.17	24.31	12.91	10.09	7.877	7.401	156.05	4.8%	31.50	43.80	55.38	25.37
2015	£M	9.059	11.45	13.43	12.09	17.17	16.08	18.89	27.46	13.91	11.15	7.891	7.587	166.17	6.5%	33.94	45.34	60.25	26.63
2016	£M	9.102	11.40	14.39	12.11	17.84	17.32	18.47	27.73	13.51	10.70	7.777	7.843	168.19	1.2%	34.89	47.27	59.71	26.32
2017	£M	9.688	11.78	14.78	13.04	19.32	18.36	19.64	29.22	14.62	11.37	8.184	8.370	178.37	6.1%	36.24	50.72	63.49	27.92
2018	£M	10.41	12.71	15.68	13.61	20.41	19.16	20.52	31.01	15.41	12.12	8.730	8.979	188.74	5.8%	38.80	53.18	66.93	29.83
2019	£M	10.98	13.49	16.80	14.30	21.23	20.41	21.13	31.79	16.19	12.73	9.003	9.215	197.27	4.5%	41.28	55.94	69.11	30.95
2020	£M	12.46	13.24	7.414	0.973	2.082	2.929	8.392	20.66	13.02	8.833	2.234	3.892	96.14	-51.3%	33.12	5.984	42.08	14.96
2021	£M	2.641	4.021	6.307	6.908	16.63	21.06	22.26	34.03	19.62	15.46	9.672	10.03	168.63	75.4%	12.97	44.59	75.91	35.16
2022	£M	11.48	13.64	18.33	15.92	23.30	23.03	23.92	33.68	18.55	14.76	10.41	11.16	218.18	29.4%	43.45	62.26	76.15	36.32
ECONOMIC IMPACT - IN HISTORIC PRICES														TOTAL					
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	£M	Economic Impact by Year and Share of Total				
Total	£M	128.82	136.76	148.91	156.05	166.17	168.19	178.37	188.74	197.27	96.14	168.63	218.18		250.00	120.0%			
All Visitor Types	£M	128.82	136.76	148.91	156.05	166.17	168.19	178.37	188.74	197.27	96.14	168.63	218.18		200.00	100.0%			
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		150.00	80.0%			
Annual Change in Share	%														100.00	60.0%			
Change in Share from 2011	%														50.00	40.0%			
Avg Ann. Change in Share	%														0.00	0.0%			

Report Prepared by: Aimee Towle. Date of Issue: 30/06/23

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STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022 Historic Prices		SERVICED ACCOMMODATION	ECONOMIC IMPACT Historic Prices						
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SERVICED ACCOMMODATION																		
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES											TOTAL	% Change						
Less than 3% change		Q1		Q2		Q3		Q4						Q1		Q2	Q3	Q4		
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change	55.2%	95.1%	79.2%	73.4%		
% Change 2011 to 2022		46.5%	57.1%	57.4%	91.3%	106.2%	89.0%	80.0%	85.4%	70.4%	72.3%	68.9%	79.8%							
% Change 2021 to 2022		383.7%	477.1%	411.0%	409.8%	280.1%	27.0%	18.4%	3.8%	6.5%	5.6%	11.4%	21.7%	65.5%	432.6%	117.2%	9.2%	12.6%		
Average Annual Change		4.2%	5.2%	5.2%	8.3%	9.7%	8.1%	7.3%	7.8%	6.4%	6.6%	6.3%	7.3%	6.8%						
2011	£M	1.207	2.787	2.382	1.256	1.557	2.053	1.820	1.956	1.560	1.592	1.910	1.590	21.67	6.376	4.867	5.336	5.092		
2012	£M	1.153	2.951	2.534	1.365	1.648	2.340	1.858	2.191	1.762	1.648	2.115	1.620	23.19						
2013	£M	1.300	3.717	3.383	1.402	1.927	2.558	1.960	2.239	1.755	1.694	2.495	1.982	26.41	13.9%	8.400	5.886	5.955	6.171	
2014	£M	1.314	3.472	3.195	1.577	1.967	2.446	2.107	2.276	2.140	1.903	2.446	1.992	26.83	1.6%	7.981	5.989	6.523	6.341	
2015	£M	1.465	3.598	3.091	1.540	2.003	2.781	2.183	2.551	2.026	1.989	2.289	1.857	27.37	2.0%	8.154	6.324	6.760	6.134	
2016	£M	1.365	3.521	3.079	1.585	1.967	2.706	2.242	2.576	1.954	1.875	2.294	1.978	27.14	-0.8%	7.966	6.258	6.773	6.147	
2017	£M	1.532	3.483	2.975	1.890	2.486	2.989	2.411	2.735	2.236	2.092	2.438	2.178	29.45	8.5%	7.989	7.365	7.382	6.708	
2018	£M	1.782	4.045	3.359	2.120	2.942	3.482	2.870	3.370	2.479	2.443	2.825	2.527	34.24	16.3%	9.186	8.544	8.718	7.796	
2019	£M	1.810	4.074	3.419	2.147	3.001	3.563	2.932	3.392	2.485	2.517	2.919	2.497	34.76	1.5%	9.303	8.710	8.809	7.932	
2020	£M	1.966	4.160	1.505	0.181	0.304	0.316	0.706	1.698	1.239	1.162	0.396	0.299	13.93	-59.9%	7.631	0.801	3.642	1.857	
2021	£M	0.366	0.758	0.734	0.471	0.845	3.055	2.766	3.495	2.497	2.598	2.895	2.349	22.83	63.9%	1.858	4.371	8.758	7.842	
2022	£M	1.769	4.377	3.749	2.402	3.211	3.881	3.276	3.627	2.659	2.744	3.226	2.859	37.78	65.5%	9.895	9.494	9.562	8.830	
ECONOMIC IMPACT - IN HISTORIC PRICES														SERVICED ACCOMMODATION						
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Economic Impact by Year and Share of Total						
Serviced	£M	21.67	23.19	26.41	26.83	27.37	27.14	29.45	34.24	34.76	13.93	22.83	37.78	£M	Economic Impact by Year and Share of Total					
All Visitor Types	£M	128.82	136.76	148.91	156.05	166.17	168.19	178.37	188.74	197.27	96.14	168.63	218.18	£M	Economic Impact by Year and Share of Total					
Share of Total	%	16.8%	17.0%	17.7%	17.2%	16.5%	16.1%	16.5%	18.1%	17.6%	14.5%	13.5%	17.3%	%	Economic Impact by Year and Share of Total					
Annual Change in Share	%	0.8%	4.6%	-3.1%	-4.2%	-2.0%	2.3%	9.9%	-2.9%	-17.8%	-6.6%	27.9%	2.9%	%	Economic Impact by Year and Share of Total					
Change in Share from 2011	%	0.8%	5.4%	2.2%	-2.1%	-4.1%	-1.9%	7.9%	4.7%	-13.9%	-19.5%	0.3%	0.3%	%	Economic Impact by Year and Share of Total					
Avg Ann. Change in Share	%	0.8%	2.7%	0.7%	-0.5%	-0.8%	-0.3%	1.1%	0.6%	-1.5%	-2.0%	0.3%	0.3%	%	Economic Impact by Year and Share of Total					

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022 Historic Prices		NON-SERVICED ACCOMMODATION	ECONOMIC IMPACT Historic Prices						
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		NON-SERVICED ACCOMMODATION											CALENDAR YEAR							
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES												Total	% Change	QUARTER				
Less than 3% change		Q1			Q2			Q3			Q4									
A Fall of 3% or more		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			Q1	Q2	Q3	Q4	
% Change 2011 to 2022		301.6%	220.1%	227.3%	147.1%	142.0%	124.7%	179.9%	186.7%	174.8%	163.0%	268.2%	421.6%	176.3%			241.6%	136.1%	181.0%	238.7%
% Change 2021 to 2022		4498.6%	4250.9%	4934.3%	285.0%	40.5%	10.4%	12.5%	10.2%	-2.5%	-6.0%	14.5%	57.3%	30.6%			4615.5%	45.5%	6.8%	12.6%
Average Annual Change		27.4%	20.0%	20.7%	13.4%	12.9%	11.3%	16.4%	17.0%	15.9%	14.8%	24.4%	38.3%	16.0%			22.0%	12.4%	16.5%	21.7%
2011	£M	0.200	0.265	0.442	0.866	1.620	1.664	1.676	2.030	1.576	0.715	0.368	0.236	11.66		0.908	4.150	5.281	1.320	
2012	£M	0.227	0.282	0.497	0.901	1.604	1.680	1.706	2.137	1.606	0.755	0.401	0.279	12.08	3.6%	1.006	4.186	5.449	1.435	
2013	£M	0.233	0.277	0.522	0.856	1.613	1.447	1.732	2.191	1.601	0.765	0.420	0.288	11.94	-1.1%	1.032	3.916	5.524	1.473	
2014	£M	0.252	0.302	0.587	0.987	1.954	1.975	2.061	2.742	2.057	0.860	0.494	0.324	14.59	22.2%	1.140	4.916	6.860	1.678	
2015	£M	0.210	0.308	0.506	0.842	1.860	1.868	2.151	2.872	1.937	0.667	0.503	0.313	14.04	-3.8%	1.024	4.570	6.959	1.484	
2016	£M	0.233	0.330	0.527	0.881	1.932	1.951	2.310	3.122	2.094	0.732	0.553	0.350	15.01	7.0%	1.090	4.763	7.527	1.635	
2017	£M	0.262	0.394	0.541	0.998	2.175	2.102	2.624	3.399	2.460	0.809	0.593	0.401	16.76	11.6%	1.197	5.274	8.483	1.803	
2018	£M	0.259	0.396	0.538	0.987	2.204	2.101	2.578	3.435	2.359	0.839	0.598	0.386	16.68	-0.5%	1.194	5.293	8.373	1.822	
2019	£M	0.306	0.430	0.579	1.174	2.484	2.283	2.891	3.688	2.503	0.873	0.687	0.436	18.33	9.9%	1.315	5.941	9.081	1.996	
2020	£M	0.684	0.644	0.555	0.062	0.170	0.176	2.445	4.226	3.867	1.485	0.124	0.452	14.89	-18.8%	1.883	0.408	10.54	2.061	
2021	£M	0.017	0.020	0.029	0.555	2.791	3.388	4.168	5.283	4.442	2.001	1.184	0.783	24.66	65.6%	0.066	6.734	13.89	3.968	
2022	£M	0.804	0.850	1.447	2.139	3.921	3.739	4.690	5.820	4.329	1.882	1.355	1.232	32.21	30.6%	3.100	9.799	14.84	4.469	
ECONOMIC IMPACT - IN HISTORIC PRICES														NON-SERVICED ACCOMMODATION						
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	£M	Economic Impact by Year and Share of Total					
Non-Serviced	£M	11.66	12.08	11.94	14.59	14.04	15.01	16.76	16.68	18.33	14.89	24.66	32.21							
All Visitor Types	£M	128.82	136.76	148.91	156.05	166.17	168.19	178.37	188.74	197.27	96.14	168.63	218.18							
Share of Total	%	9.0%	8.8%	8.0%	9.4%	8.4%	8.9%	9.4%	8.8%	9.3%	15.5%	14.6%	14.8%							
Annual Change in Share	%		-2.4%	-9.2%	16.6%	-9.7%	5.7%	5.2%	-5.9%	5.2%	66.6%	-5.6%	0.9%							
Change in Share from 2011	%		-2.4%	-11.4%	3.3%	-6.7%	-1.4%	3.8%	-2.3%	2.7%	71.1%	61.6%	63.1%							
Avg Ann. Change in Share	%		-2.4%	-5.7%	1.1%	-1.7%	-0.3%	0.6%	-0.3%	0.3%	7.9%	6.2%	5.7%							

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL												2011 to 2022 Historic Prices		SFR		ECONOMIC IMPACT Historic Prices						
ECONOMIC IMPACT BY:		MONTH AND QUARTER												CALENDAR YEAR		QUARTER						
KEY		SFR																				
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER						
Less than 3% change		Q1			Q2			Q3			Q4											
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1		Q2		Q3		Q4
% Change 2011 to 2022		52.9%	43.0%	53.9%	56.6%	61.5%	57.9%	63.1%	64.7%	65.1%	57.0%	55.6%	60.7%	58.1%		51.0%	58.5%	64.2%	58.8%	Annual Change		
% Change 2021 to 2022		745.6%	706.0%	745.6%	191.5%	7.6%	-13.1%	-10.6%	-10.1%	-29.9%	-31.5%	-13.5%	-7.3%	24.0%		737.2%	37.4%	-15.6%	-15.7%			
Average Annual Change		4.8%	3.9%	4.9%	5.1%	5.6%	5.3%	5.7%	5.9%	5.9%	5.2%	5.1%	5.5%	5.3%		4.6%	5.3%	5.8%	5.3%			
2011	£M	2.592	1.007	1.059	2.200	1.547	1.232	1.815	1.907	1.067	1.004	0.834	2.264	18.53		4.658	4.979	4.790	4.102			
2012	£M	2.672	1.037	1.115	2.306	1.597	1.287	1.886	2.006	1.118	1.051	0.885	2.379	19.34	4.4%	4.824	5.190	5.009	4.314			
2013	£M	2.800	1.139	1.219	2.358	1.662	1.316	1.969	2.092	1.144	1.081	0.938	2.531	20.25	4.7%	5.158	5.336	5.205	4.551			
2014	£M	2.890	1.139	1.223	2.461	1.737	1.371	2.067	2.209	1.231	1.129	0.962	2.605	21.02	3.8%	5.253	5.569	5.508	4.696			
2015	£M	2.919	1.112	1.221	2.479	1.780	1.422	2.129	2.290	1.250	1.138	0.945	2.533	21.22	0.9%	5.252	5.680	5.669	4.616			
2016	£M	2.961	1.132	1.248	2.547	1.827	1.458	2.197	2.369	1.294	1.163	0.974	2.629	21.80	2.7%	5.341	5.832	5.860	4.766			
2017	£M	3.135	1.174	1.275	2.708	1.966	1.538	2.335	2.495	1.398	1.228	1.019	2.776	23.05	5.7%	5.585	6.212	6.228	5.023			
2018	£M	3.338	1.264	1.352	2.835	2.064	1.613	2.428	2.612	1.435	1.303	1.084	2.972	24.30	5.4%	5.955	6.512	6.475	5.359			
2019	£M	3.432	1.287	1.384	2.945	2.144	1.661	2.523	2.690	1.471	1.335	1.122	3.035	25.03	3.0%	6.103	6.750	6.683	5.492			
2020	£M	4.619	1.409	0.784	0.190	0.167	0.133	1.549	2.438	1.750	1.266	0.165	1.082	15.55	-37.9%	6.812	0.490	5.737	2.513			
2021	£M	0.469	0.179	0.193	1.182	2.322	2.240	3.312	3.495	2.513	2.302	1.500	3.926	23.63	52.0%	0.840	5.744	9.319	7.728			
2022	£M	3.963	1.441	1.630	3.446	2.498	1.946	2.961	3.142	1.763	1.577	1.297	3.638	29.30	24.0%	7.033	7.890	7.865	6.512			
ECONOMIC IMPACT - IN HISTORIC PRICES														SFR				£M				
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Economic Impact by Year and Share of Total								
SFR		£M	18.53	19.34	20.25	21.02	21.22	21.80	23.05	24.30	25.03	15.55	23.63	29.30	£M				Economic Impact by Year and Share of Total			
All Visitor Types		£M	128.82	136.76	148.91	156.05	166.17	168.19	178.37	188.74	197.27	96.14	168.63	218.18								
Share of Total		%	14.4%	14.1%	13.6%	13.5%	12.8%	13.0%	12.9%	12.9%	12.7%	16.2%	14.0%	13.4%	£M				£M			
Annual Change in Share		%	-1.7%	-3.8%	-0.9%	-5.2%	1.5%	-0.3%	-0.4%	-1.5%	27.5%	-13.4%	-4.2%	£M				£M				
Change in Share from 2011		%	-1.7%	-5.5%	-6.3%	-11.2%	-9.9%	-10.2%	-10.5%	-11.8%	12.5%	-2.6%	-6.6%	£M				£M				
Avg Ann. Change in Share		%	-1.7%	-2.7%	-2.1%	-2.8%	-2.0%	-1.7%	-1.5%	-1.5%	1.4%	-0.3%	-0.6%	£M				£M				

Report Prepared by: Aimee Towle. Date of Issue: 30/06/23



STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL												2011 to 2022 Historic Prices		STAYING VISITOR		ECONOMIC IMPACT Historic Prices							
ECONOMIC IMPACT BY:		MONTH AND QUARTER												CALENDAR YEAR		QUARTER							
KEY		STAYING VISITOR																					
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER							
Less than 3% change		Q1			Q2			Q3			Q4						Q1		Q2	Q3	Q4		
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Annual Change	67.7%	94.2%	109.4%	88.4%			
% Change 2011 to 2022		63.4%	64.2%	75.8%	84.8%	103.9%	93.3%	105.7%	113.6%	108.2%	87.3%	88.9%	89.0%	91.5%			624.7%	61.3%	0.9%	1.4%			
% Change 2021 to 2022		667.3%	596.9%	614.6%	261.6%	61.7%	10.2%	6.6%	2.6%	-7.4%	-10.1%	5.4%	9.5%	39.6%									
Average Annual Change		5.8%	5.8%	6.9%	7.7%	9.4%	8.5%	9.6%	10.3%	9.8%	7.9%	8.1%	8.1%	8.3%			6.2%	8.6%	9.9%	8.0%			
2011	£M	3.999	4.059	3.883	4.322	4.724	4.950	5.311	5.893	4.203	3.312	3.112	4.090	51.86			11.94	14.00	15.41	10.51			
2012	£M	4.052	4.270	4.145	4.572	4.850	5.308	5.450	6.334	4.486	3.454	3.401	4.278	54.60	5.3%		12.47	14.73	16.27	11.13			
2013	£M	4.333	5.133	5.124	4.616	5.202	5.320	5.662	6.521	4.501	3.540	3.853	4.802	58.61			14.59	15.14	16.68	12.20			
2014	£M	4.455	4.913	5.005	5.024	5.658	5.792	6.234	7.228	5.429	3.891	3.901	4.921	62.45	6.6%		14.37	16.47	18.89	12.71			
2015	£M	4.593	5.018	4.818	4.861	5.643	6.071	6.463	7.713	5.213	3.794	3.738	4.703	62.63			14.43	16.57	19.39	12.23			
2016	£M	4.559	4.984	4.854	5.013	5.726	6.115	6.749	8.067	5.343	3.770	3.820	4.957	63.96	2.1%		14.40	16.85	20.16	12.55			
2017	£M	4.929	5.051	4.791	5.596	6.626	6.629	7.369	8.629	6.095	4.128	4.051	5.355	69.25			14.77	18.85	22.09	13.53			
2018	£M	5.379	5.706	5.249	5.943	7.210	7.196	7.876	9.417	6.273	4.585	4.507	5.885	75.23	8.3%		16.33	20.35	23.57	14.98			
2019	£M	5.548	5.791	5.382	6.266	7.628	7.507	8.345	9.770	6.458	4.726	4.727	5.968	78.12			16.72	21.40	24.57	15.42			
2020	£M	7.269	6.213	2.845	0.434	0.640	0.624	4.699	8.362	6.855	3.914	0.684	1.833	44.37	-43.2%		16.33	1.698	19.92	6.431			
2021	£M	0.852	0.957	0.955	2.209	5.957	8.683	10.25	12.27	9.452	6.901	5.579	7.058	71.12			2.763	16.85	31.97	19.54			
2022	£M	6.535	6.667	6.826	7.987	9.630	9.566	10.93	12.59	8.751	6.202	5.879	7.729	99.29	39.6%		20.03	27.18	32.27	19.81			
ECONOMIC IMPACT - IN HISTORIC PRICES												STAYING VISITOR											
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022										
Staying Visitor	£M	51.86	54.60	58.61	62.45	62.63	63.96	69.25	75.23	78.12	44.37	71.12	99.29										
All Visitor Types	£M	128.82	136.76	148.91	156.05	166.17	168.19	178.37	188.74	197.27	96.14	168.63	218.18										
Share of Total	%	40.3%	39.9%	39.4%	40.0%	37.7%	38.0%	38.8%	39.9%	39.6%	46.2%	42.2%	45.5%										
Annual Change in Share	%		-0.8%	-1.4%	1.7%	-5.8%	0.9%	2.1%	2.7%	-0.6%	16.6%	-8.6%	7.9%										
Change in Share from 2011	%		-0.8%	-2.2%	-0.6%	-6.4%	-5.5%	-3.6%	-1.0%	-1.6%	14.7%	4.8%	13.0%										
Avg Ann. Change in Share	%		-0.8%	-1.1%	-0.2%	-1.6%	-1.1%	-0.6%	-0.1%	-0.2%	1.6%	0.5%	1.2%										

£M

Economic Impact by Year and Share of Total

Year	Impact (£M)	Share of Total (%)
2011	51.86	40.3%
2012	54.60	39.9%
2013	58.61	39.4%
2014	62.45	40.0%
2015	62.63	37.7%
2016	63.96	38.0%
2017	69.25	38.8%
2018	75.23	39.9%
2019	78.12	39.6%
2020	44.37	46.2%
2021	71.12	42.2%
2022	99.29	45.5%

0.00 20.00 40.00 60.00 80.00 100.00 120.00

0.0% 10.0% 20.0% 30.0% 40.0% 50.0%

2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

Staying Visitor £M Share of Total %

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL												2011 to 2022 Historic Prices		DAY VISITOR		ECONOMIC IMPACT Historic Prices					
ECONOMIC IMPACT BY:		MONTH AND QUARTER												CALENDAR YEAR		QUARTER					
KEY		DAY VISITOR																			
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER					
Less than 3% change		Q1			Q2			Q3			Q4										
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4		
% Change 2011 to 2022		40.1%	56.7%	140.6%	25.6%	58.3%	68.2%	38.4%	58.4%	39.2%	47.2%	34.0%	48.7%	54.5%		83.5%	52.7%	47.5%	43.6%		
% Change 2021 to 2022		176.4%	127.6%	114.9%	68.9%	28.1%	8.8%	8.1%	-3.0%	-3.5%	-0.1%	10.6%	15.5%	21.9%		129.5%	26.4%	-0.1%	5.7%		
Average Annual Change		3.6%	5.2%	12.8%	2.3%	5.3%	6.2%	3.5%	5.3%	3.6%	4.3%	3.1%	4.4%	5.0%		7.6%	4.8%	4.3%	4.0%		
2011	£M	3.529	4.452	4.781	6.322	8.638	8.006	9.388	13.31	7.041	5.809	3.378	2.307	76.96	Annual Change	12.76	22.97	29.74	11.49		
2012	£M	3.859	4.837	5.712	5.879	8.507	9.035	10.57	14.86	7.469	5.693	3.544	2.199	82.16		6.8%	14.41	23.42	32.90	11.44	
2013	£M	3.923	5.292	6.517	6.181	10.59	9.161	11.64	16.95	7.725	6.051	3.800	2.471	90.30	9.9%	15.73	25.93	36.32	12.32		
2014	£M	3.703	5.469	7.953	7.032	10.81	9.482	11.93	17.08	7.477	6.198	3.976	2.479	93.59	3.6%	17.12	27.33	36.49	12.65		
2015	£M	4.465	6.433	8.610	7.230	11.53	10.01	12.42	19.75	8.694	7.358	4.154	2.883	103.54	10.6%	19.51	28.77	40.87	14.39		
2016	£M	4.543	6.420	9.531	7.099	12.12	11.20	11.72	19.67	8.164	6.927	3.957	2.886	104.23	0.7%	20.49	30.42	39.55	13.77		
2017	£M	4.759	6.726	9.986	7.439	12.70	11.73	12.27	20.59	8.529	7.237	4.134	3.015	109.12	4.7%	21.47	31.87	41.40	14.39		
2018	£M	5.029	7.004	10.43	7.671	13.20	11.96	12.64	21.59	9.135	7.537	4.223	3.094	113.52	4.0%	22.46	32.83	43.37	14.85		
2019	£M	5.435	7.702	11.42	8.035	13.60	12.90	12.78	22.02	9.732	8.002	4.276	3.247	119.15	5.0%	24.56	34.53	44.54	15.52		
2020	£M	5.194	7.029	4.570	0.539	1.442	2.305	3.692	12.30	6.166	4.919	1.550	2.058	51.77	-56.6%	16.79	4.286	22.16	8.528		
2021	£M	1.789	3.065	5.352	4.699	10.67	12.38	12.02	21.75	10.16	8.560	4.093	2.969	97.51	88.4%	10.21	27.74	43.94	15.62		
2022	£M	4.945	6.975	11.50	7.937	13.67	13.46	12.99	21.09	9.804	8.553	4.527	3.429	118.89	21.9%	23.42	35.07	43.89	16.51		
ECONOMIC IMPACT - IN HISTORIC PRICES														DAY VISITOR							
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	£M	Economic Impact by Year and Share of Total						
Day Visitor	£M	76.96	82.16	90.30	93.59	103.54	104.23	109.12	113.52	119.15	51.77	97.51	118.89								
All Visitor Types	£M	128.82	136.76	148.91	156.05	166.17	168.19	178.37	188.74	197.27	96.14	168.63	218.18								
Share of Total	%	59.7%	60.1%	60.6%	60.0%	62.3%	62.0%	61.2%	60.1%	60.4%	53.8%	57.8%	54.5%								
Annual Change in Share	%		0.6%	0.9%	-1.1%	3.9%	-0.5%	-1.3%	-1.7%	0.4%	-10.9%	7.4%	-5.8%								
Change in Share from 2011	%		0.6%	1.5%	0.4%	4.3%	3.7%	2.4%	0.7%	1.1%	-9.9%	-3.2%	-8.8%								
Avg Ann. Change in Share	%		0.6%	0.8%	0.1%	1.1%	0.7%	0.4%	0.1%	0.1%	-1.1%	-0.3%	-0.8%								

Report Prepared by: Aimee Towle. Date of Issue: 30/06/23

Visitor Numbers by Month, Year and Visitor Type for the Period 2011 to 2022

Visitor Types: *Total*

Serviced Accommodation

Non-Serviced Accommodation

SFR

Staying Visitor

Day Visitor

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		TOTAL		VISITOR NUMBERS										
VISITOR NUMBERS BY:		MONTH AND QUARTER												CALENDAR YEAR		QUARTER									
KEY		TOTAL																							
An increase of 3% or more		VISITOR NUMBERS IN MILLIONS / PERCENTAGE CHANGES												TOTAL		% Change									
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2		Q3		Q4			
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Annual Change		29.1%		11.1%		9.0%		7.3%	
% Change 2011 to 2022		2.8%	14.6%	64.0%	-6.2%	15.3%	20.7%	2.9%	15.8%	4.5%	7.1%	2.3%	13.9%	12.9%			137.2%		20.9%		-7.3%		-2.2%		
% Change 2021 to 2022		198.5%	138.7%	114.0%	71.7%	22.3%	0.9%	0.1%	-9.7%	-11.0%	-8.5%	1.9%	6.8%	15.7%											
Average Annual Change		0.3%	1.3%	5.8%	-0.6%	1.4%	1.9%	0.3%	1.4%	0.4%	0.6%	0.2%	1.3%	1.2%			2.6%		1.0%		0.8%		0.7%		
2011	M	0.144	0.169	0.179	0.230	0.305	0.284	0.328	0.454	0.249	0.206	0.130	0.106	2.786			0.493		0.819		1.031		0.443		
2012	M	0.149	0.176	0.203	0.210	0.291	0.306	0.353	0.486	0.254	0.196	0.132	0.102	2.858	2.6%		0.528		0.807		1.093		0.430		
2013	M	0.148	0.191	0.225	0.211	0.344	0.301	0.375	0.534	0.254	0.200	0.138	0.110	3.032	6.1%		0.564		0.856		1.163		0.448		
2014	M	0.138	0.188	0.258	0.231	0.342	0.302	0.376	0.526	0.245	0.201	0.140	0.108	3.056	0.8%		0.585		0.876		1.147		0.449		
2015	M	0.158	0.214	0.273	0.233	0.359	0.314	0.386	0.598	0.277	0.231	0.144	0.117	3.305	8.1%		0.645		0.906		1.262		0.491		
2016	M	0.159	0.212	0.295	0.228	0.371	0.344	0.362	0.588	0.258	0.215	0.136	0.116	3.282	-0.7%		0.665		0.942		1.208		0.467		
2017	M	0.163	0.215	0.300	0.234	0.381	0.352	0.371	0.601	0.265	0.220	0.138	0.119	3.359	2.3%		0.678		0.967		1.237		0.477		
2018	M	0.167	0.219	0.303	0.233	0.383	0.347	0.369	0.608	0.272	0.221	0.139	0.121	3.380	0.6%		0.688		0.963		1.249		0.481		
2019	M	0.174	0.232	0.322	0.238	0.385	0.364	0.365	0.605	0.282	0.229	0.138	0.122	3.456	2.2%		0.728		0.987		1.252		0.489		
2020	M	0.174	0.211	0.129	0.016	0.039	0.060	0.112	0.340	0.186	0.142	0.043	0.062	1.512	-56.2%		0.514		0.115		0.637		0.247		
2021	M	0.050	0.081	0.137	0.126	0.288	0.340	0.337	0.582	0.292	0.242	0.131	0.113	2.719	79.8%		0.268		0.753		1.212		0.486		
2022	M	0.148	0.194	0.293	0.216	0.352	0.343	0.338	0.526	0.260	0.221	0.133	0.121	3.145	15.7%		0.636		0.911		1.123		0.475		
VISITOR NUMBERS														TOTAL											
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	M	Visitor No.s by Year and Share of Total										
Total	M	2.786	2.858	3.032	3.056	3.305	3.282	3.359	3.380	3.456	1.512	2.719	3.145												
All Visitor Types	M	2.786	2.858	3.032	3.056	3.305	3.282	3.359	3.380	3.456	1.512	2.719	3.145												
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%												
Annual Change in Share	%																								
Change in Share from 2011	%																								
Avg Ann. Change in Share	%																								



STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		SERVICED		VISITOR NUMBERS										
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER										
KEY		SERVICED ACCOMMODATION																							
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES											TOTAL		QUARTER										
Less than 3% change		Q1			Q2			Q3			Q4			% Change		Q1		Q2		Q3		Q4			
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Annual Change		15.9%		20.2%		37.9%		29.3%	
% Change 2011 to 2022		-4.1%	34.4%	4.3%	15.4%	33.3%	13.3%	41.8%	31.8%	39.8%	6.1%	31.2%	43.7%	24.9%			415.0%		114.0%		4.9%		9.2%		
% Change 2021 to 2022		364.2%	453.0%	389.0%	390.1%	265.1%	21.6%	13.7%	-0.5%	1.9%	1.1%	6.7%	16.6%	60.9%											
Average Annual Change		-0.4%	3.1%	0.4%	1.4%	3.0%	1.2%	3.8%	2.9%	3.6%	0.6%	2.8%	4.0%	2.3%			1.4%		1.8%		3.4%		2.7%		
2011	000s	6.6	15.6	13.5	6.5	7.6	9.7	7.6	7.3	7.8	7.8	11.8	11.1	112.8			35.6		23.8		22.7		30.7		
2012	000s	5.8	16.0	14.3	6.8	7.7	10.3	7.5	7.6	8.8	7.6	12.5	12.3	117.1	3.8%		36.1		24.7		23.9		32.3		
2013	000s	6.3	21.8	17.5	5.5	8.1	10.8	7.8	7.9	8.4	6.9	13.8	13.8	128.6	9.8%		45.6		24.4		24.1		34.5		
2014	000s	5.7	18.3	14.9	5.5	7.3	9.2	8.4	8.0	10.2	7.7	13.5	13.8	122.6	-4.7%		38.9		22.0		26.6		35.0		
2015	000s	5.7	18.7	14.0	5.1	7.5	9.2	8.6	8.2	10.1	7.5	13.2	12.9	120.4	-1.8%		38.4		21.7		26.8		33.5		
2016	000s	5.5	18.9	13.2	5.5	7.0	8.7	8.3	7.6	9.1	6.4	12.4	12.5	115.0	-4.5%		37.5		21.1		25.0		31.3		
2017	000s	6.1	18.3	12.4	6.4	8.5	9.3	9.0	8.2	10.1	6.9	12.8	13.4	121.1	5.4%		36.8		24.1		27.2		33.0		
2018	000s	7.1	21.2	13.9	7.2	10.1	10.8	10.2	9.6	11.2	8.1	14.8	15.5	139.7	15.3%		42.2		28.1		31.0		38.4		
2019	000s	7.1	21.1	13.9	7.2	10.2	10.9	10.4	9.6	11.0	8.2	15.1	15.1	139.8	0.1%		42.1		28.3		31.0		38.4		
2020	000s	7.5	21.2	6.0	0.6	1.0	1.0	2.5	4.8	5.5	3.8	2.0	1.8	57.5	-58.9%		34.7		2.6		12.7		7.5		
2021	000s	1.4	3.8	2.9	1.5	2.8	9.1	9.4	9.6	10.8	8.2	14.5	13.7	87.6	52.3%		8.0		13.4		29.8		36.4		
2022	000s	6.3	20.9	14.1	7.5	10.1	11.0	10.7	9.6	11.0	8.3	15.4	16.0	140.9	60.9%		41.3		28.6		31.3		39.7		
VISITOR NUMBERS														SERVICED ACCOMMODATION											
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	000s	Visitor No.s by Year and Share of Total										
Serviced	000s	112.8	117.1	128.6	122.6	120.4	115.0	121.1	139.7	139.8	57.5	87.6	140.9												
All Visitor Types	M	2.8	2.9	3.0	3.1	3.3	3.3	3.4	3.4	3.5	1.5	2.7	3.1												
Share of Total	%	4.0%	4.1%	4.2%	4.0%	3.6%	3.5%	3.6%	4.1%	4.0%	3.8%	3.2%	4.5%												
Annual Change in Share	%	1.2%	3.5%	-5.5%	-9.2%	-3.9%	3.0%	14.6%	-2.1%	-6.0%	-15.3%	39.1%													
Change in Share from 2011	%	1.2%	4.8%	-0.9%	-10.0%	-13.5%	-10.9%	2.1%	-0.1%	-6.1%	-20.5%	10.6%													
Avg Ann. Change in Share	%	1.2%	2.4%	-0.3%	-2.5%	-2.7%	-1.8%	0.3%	0.0%	-0.7%	-2.0%	1.0%													



This chart displays the number of visitors (Serviced 000s) and the share of the total tourism market for South Kesteven District Council from 2011 to 2022. The bars represent the number of visitors, and the line with markers represents the share of the total tourism market. The share of the total market shows significant fluctuations, particularly after 2015, while the number of visitors generally shows a positive growth trend.

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		NON-SERVICED		VISITOR NUMBERS										
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER										
KEY		NON-SERVICED ACCOMMODATION																							
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER									
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2		Q3		Q4			
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			77.2%		34.8%		90.7%		89.6%			
% Change 2011 to 2022		99.8%	77.4%	68.4%	34.1%	41.0%	28.7%	80.1%	97.1%	93.3%	53.8%	120.1%	147.3%	68.0%		4260.0%		35.4%		0.1%		2.4%			
% Change 2021 to 2022		4134.9%	3913.7%	4550.0%	255.2%	30.2%	2.3%	7.3%	4.7%	-9.7%	-13.3%	5.8%	45.0%	20.0%		Annual Change		4260.0%		35.4%		0.1%			
Average Annual Change		9.1%	7.0%	6.2%	3.1%	3.7%	2.6%	7.3%	8.8%	8.5%	4.9%	10.9%	13.4%	6.2%		7.0%		3.2%		8.2%		8.1%			
2011	000s	0.7	0.9	1.7	3.4	6.2	6.0	5.0	6.2	5.5	2.7	1.5	0.9	40.7		3.2		15.6		16.7		5.1			
2012	000s	0.7	0.9	1.7	3.5	6.0	5.8	4.9	6.2	5.4	2.8	1.6	0.9	40.6		-0.2%		3.4		15.3		16.5			
2013	000s	0.6	0.9	1.7	3.3	6.1	4.8	4.9	6.3	5.5	2.8	1.7	0.9	39.5		-2.7%		3.2		14.2		16.7			
2014	000s	0.6	0.8	1.7	3.3	6.4	5.7	5.8	7.8	6.8	3.1	2.0	1.0	45.0		13.9%		3.1		15.4		20.4			
2015	000s	0.4	0.8	1.4	2.6	5.7	4.8	5.6	8.8	7.4	2.4	2.1	0.8	42.8		-4.9%		2.6		13.1		21.8			
2016	000s	0.5	0.9	1.4	2.6	5.6	5.2	5.8	8.5	6.6	2.3	1.8	0.9	42.1		-1.6%		2.9		13.4		20.9			
2017	000s	0.6	1.0	1.5	2.9	6.2	5.5	6.4	9.0	7.6	2.4	1.9	1.0	45.9		9.2%		3.1		14.5		23.0			
2018	000s	0.6	1.0	1.4	2.7	6.0	5.3	6.1	8.8	7.0	2.4	1.9	0.9	44.1		-4.0%		3.0		14.0		21.9			
2019	000s	0.7	1.1	1.5	3.2	6.7	5.6	6.8	9.3	7.3	2.5	2.1	1.0	47.6		8.0%		3.2		15.5		23.4			
2020	000s	1.3	1.4	1.2	0.2	0.4	0.4	5.1	9.6	10.5	3.7	0.3	0.9	35.0		-26.6%		3.9		1.0		25.2			
2021	000s	0.0	0.0	0.1	1.3	6.8	7.5	8.4	11.7	11.7	4.8	3.1	1.5	56.9		62.8%		0.1		15.6		31.8			
2022	000s	1.3	1.6	2.8	4.6	8.8	7.7	9.1	12.2	10.6	4.2	3.3	2.2	68.3		20.0%		5.8		21.1		31.8			
VISITOR NUMBERS														NON-SERVICED ACCOMMODATION											
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	000s	Visitor No.s by Year and Share of Total										
Non-Serviced	000s	40.7	40.6	39.5	45.0	42.8	42.1	45.9	44.1	47.6	35.0	56.9	68.3												
All Visitor Types	M	2.8	2.9	3.0	3.1	3.3	3.3	3.4	3.4	3.5	1.5	2.7	3.1												
Share of Total	%	1.5%	1.4%	1.3%	1.5%	1.3%	1.3%	1.4%	1.3%	1.4%	2.3%	2.1%	2.2%												
Annual Change in Share	%	-2.7%	-8.3%	13.0%	-12.1%	-0.9%	6.7%	-4.6%	5.7%	67.8%	-9.5%	3.7%													
Change in Share from 2011	%	-2.7%	-10.8%	0.8%	-11.3%	-12.2%	-6.3%	-10.7%	-5.6%	58.4%	43.4%	48.8%													
Avg Ann. Change in Share	%	-2.7%	-5.4%	0.3%	-2.8%	-2.4%	-1.1%	-1.5%	-0.7%	6.5%	4.3%	4.4%													



STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		SFR		VISITOR NUMBERS									
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER									
KEY		SFR																						
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER									
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2		Q3		Q4		
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	13.9%	Annual Change	8.7%		14.3%		18.4%		14.3%		
% Change 2011 to 2022		10.2%	3.1%	10.9%	12.9%	16.4%	13.8%	17.6%	18.7%	19.0%	13.2%	12.2%	15.8%			560.3%	560.3%	47.8%	47.8%	-15.0%	-15.0%	-11.6%	-11.6%	
% Change 2021 to 2022		566.7%	554.2%	552.8%	220.6%	34.7%	-8.9%	-9.3%	-12.6%	-25.0%	-26.3%	-10.5%	-2.0%	28.2%	0.8%	0.4%	49.5	49.5	51.3	51.3	48.9	48.9	43.7	43.7
Average Annual Change		0.9%	0.3%	1.0%	1.2%	1.5%	1.3%	1.6%	1.7%	1.7%	1.2%	1.1%	1.4%	1.3%			50.0	50.0	54.6	54.6	52.7	52.7	44.5	44.5
2011	000s	24.9	11.5	11.8	19.6	16.9	14.1	17.5	17.6	11.8	11.3	9.9	20.9	188.0	48.3	0.4%	48.2	48.2	50.8	50.8	47.2	47.2	42.6	42.6
2012	000s	24.7	11.4	12.0	19.8	16.8	14.2	17.5	17.9	11.9	11.4	10.1	21.2	188.8			50.0	50.0	50.6	50.6	47.5	47.5	43.5	43.5
2013	000s	25.1	12.2	12.7	19.6	16.9	14.0	17.7	18.0	11.8	11.3	10.4	21.8	191.5	1.4%	1.0%	49.5	49.5	51.3	51.3	48.9	48.9	43.7	43.7
2014	000s	25.2	11.8	12.4	19.9	17.2	14.2	18.0	18.5	12.4	11.5	10.3	21.9	193.4			48.9	48.9	51.9	51.9	49.8	49.8	42.5	42.5
2015	000s	25.2	11.4	12.3	19.8	17.4	14.6	18.4	19.0	12.4	11.5	10.0	21.0	193.1	-0.2%	1.4%	49.0	49.0	52.5	52.5	50.8	50.8	43.3	43.3
2016	000s	25.2	11.5	12.4	20.1	17.7	14.8	18.7	19.4	12.7	11.6	10.2	21.5	195.7			50.0	50.0	54.6	54.6	52.7	52.7	44.5	44.5
2017	000s	26.0	11.6	12.3	20.8	18.5	15.2	19.4	19.9	13.4	11.9	10.4	22.2	201.7	3.1%	1.4%	51.2	51.2	55.0	55.0	52.7	52.7	45.6	45.6
2018	000s	26.7	12.0	12.6	21.0	18.7	15.3	19.4	20.1	13.2	12.2	10.7	22.8	204.6			51.2	51.2	55.6	55.6	53.0	53.0	45.6	45.6
2019	000s	26.7	11.9	12.5	21.2	19.0	15.4	19.7	20.1	13.2	12.2	10.8	22.7	205.5	0.4%	0.4%	51.2	51.2	55.6	55.6	53.0	53.0	45.6	45.6
2020	000s	35.0	12.7	6.9	1.3	1.4	1.2	11.7	17.8	15.3	11.2	1.5	7.9	124.1			-39.6%	-39.6%	54.7	54.7	4.0	44.8	20.6	20.6
2021	000s	4.1	1.8	2.0	6.9	14.6	17.6	22.7	24.0	18.8	17.3	12.4	24.8	167.0	28.2%	1.0%	8.0	8.0	39.2	39.2	65.4	65.4	54.5	54.5
2022	000s	27.5	11.9	13.1	22.1	19.7	16.1	20.5	21.0	14.1	12.8	11.1	24.3	214.1			52.5	52.5	57.9	57.9	55.6	55.6	48.1	48.1
VISITOR NUMBERS														SFR										
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	000s	Visitor No.s by Year and Share of Total									
SFR		188.0	188.8	191.5	193.4	193.1	195.7	201.7	204.6	205.5	124.1	167.0	214.1	250.0	Visitor No.s by Year and Share of Total									
000s		2.8	2.9	3.0	3.1	3.3	3.3	3.4	3.4	3.5	1.5	2.7	3.1		Share of Total %									
All Visitor Types		6.7%	6.6%	6.3%	6.3%	5.8%	6.0%	6.0%	6.1%	5.9%	8.2%	6.1%	6.8%		Share of Total %									
M		-2.1%	-4.4%	0.2%	-7.7%	2.1%	0.7%	0.8%	-1.8%	38.0%	-25.1%	10.8%												
Share of Total		6.7%	6.6%	6.3%	6.3%	5.8%	6.0%	6.0%	6.1%	5.9%	8.2%	6.1%	6.8%	200.0	Share of Total %									
%		-2.1%	-6.4%	-6.2%	-13.5%	-11.7%	-11.0%	-10.3%	-11.9%	21.6%	-9.0%	0.9%												
Annual Change in Share		-2.1%	-4.4%	0.2%	-7.7%	2.1%	0.7%	0.8%	-1.8%	38.0%	-25.1%	10.8%	150.0	Share of Total %										
%		-2.1%	-6.4%	-6.2%	-13.5%	-11.7%	-11.0%	-10.3%	-11.9%	21.6%	-9.0%	0.9%												
Change in Share from 2011		-2.1%	-6.4%	-6.2%	-13.5%	-11.7%	-11.0%	-10.3%	-11.9%	21.6%	-9.0%	0.9%	100.0	Share of Total %										
%		-2.1%	-3.2%	-2.1%	-3.4%	-2.3%	-1.8%	-1.5%	-1.5%	2.4%	-0.9%	0.1%												
Avg Ann. Change in Share		-2.1%	-3.2%	-2.1%	-3.4%	-2.3%	-1.8%	-1.5%	-1.5%	2.4%	-0.9%	0.1%	50.0	Share of Total %										
%		-2.1%	-3.2%	-2.1%	-3.4%	-2.3%	-1.8%	-1.5%	-1.5%	2.4%	-0.9%	0.1%												

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Report Prepared by: Aimee Towle. Date of Issue: 30/06/23

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		STAYING VISITOR		VISITOR NUMBERS											
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER											
KEY		STAYING VISITOR																								
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES											TOTAL		QUARTER											
Less than 3% change		Q1			Q2			Q3			Q4			% Change		Q1		Q2		Q3		Q4				
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			14.2%		19.4%		37.5%		25.1%				
% Change 2011 to 2022		9.1%	22.9%	11.2%	15.9%	25.6%	16.6%	34.1%	37.4%	41.7%	15.7%	28.8%	28.8%	24.0%		518.3%		58.0%		-6.6%		-2.8%				
% Change 2021 to 2022		536.9%	510.2%	506.9%	251.7%	59.8%	1.6%	-0.5%	-5.6%	-13.7%	-16.8%	-0.5%	6.2%	35.9%		Annual Change		Q1		Q2		Q3		Q4		
Average Annual Change		0.8%	2.1%	1.0%	1.4%	2.3%	1.5%	3.1%	3.4%	3.8%	1.4%	2.6%	2.6%	2.2%		1.3%		1.8%		3.4%		2.3%				
2011	000s	32.2	28.0	27.0	29.5	30.7	29.8	30.1	31.1	25.1	21.8	23.1	33.0	341.5			87.2		90.1		86.3		77.9			
2012	000s	31.3	28.4	28.0	30.1	30.5	30.3	29.9	31.7	26.1	21.7	24.2	34.4	346.5	1.5%			87.6		90.8		87.7		80.3		
2013	000s	32.0	34.9	31.9	28.4	31.1	29.7	30.4	32.2	25.7	21.1	25.9	36.5	359.6	3.8%			98.8		89.1		88.3		83.4		
2014	000s	31.5	31.0	29.0	28.7	30.9	29.1	32.2	34.3	29.4	22.4	25.8	36.6	361.0	0.4%			91.5		88.7		95.9		84.8		
2015	000s	31.3	31.0	27.6	27.5	30.6	28.6	32.6	36.0	29.9	21.3	25.3	34.6	356.2	-1.3%			89.8		86.7		98.4		81.3		
2016	000s	31.2	31.2	27.0	28.1	30.3	28.7	32.8	35.5	28.4	20.2	24.4	34.9	352.7	-1.0%			89.4		87.0		96.7		79.6		
2017	000s	32.7	30.9	26.1	30.0	33.2	30.0	34.8	37.0	31.1	21.3	25.1	36.5	368.7	4.5%			89.8		93.2		102.9		82.8		
2018	000s	34.3	34.3	27.8	30.9	34.9	31.4	35.7	38.5	31.4	22.7	27.3	39.2	388.3	5.3%			96.4		97.2		105.6		89.2		
2019	000s	34.5	34.1	27.9	31.6	35.8	32.0	36.8	39.1	31.6	22.8	27.9	38.8	392.9	1.2%			96.5		99.4		107.4		89.6		
2020	000s	43.8	35.3	14.2	2.1	2.9	2.6	19.3	32.2	31.2	18.7	3.9	10.6	216.6	-44.9%			93.2		7.5		82.7		33.2		
2021	000s	5.5	5.6	5.0	9.7	24.1	34.2	40.5	45.3	41.2	30.4	29.9	40.0	311.5	43.8%			16.1		68.1		127.0		100.3		
2022	000s	35.1	34.4	30.1	34.2	38.6	34.8	40.3	42.8	35.6	25.3	29.8	42.5	423.4	35.9%			99.6		107.6		118.7		97.5		
VISITOR NUMBERS														STAYING VISITOR												
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	000s	Visitor No.s by Year and Share of Total											
Staying Visitor	000s	341.5	346.5	359.6	361.0	356.2	352.7	368.7	388.3	392.9	216.6	311.5	423.4	500.00												
All Visitor Types	M	2.8	2.9	3.0	3.1	3.3	3.3	3.4	3.4	3.5	1.5	2.7	3.1	400.00												
Share of Total	%	12.3%	12.1%	11.9%	11.8%	10.8%	10.7%	11.0%	11.5%	11.4%	14.3%	11.5%	13.5%	400.00												
Annual Change in Share	%	-1.1%	-2.2%	-0.4%	-8.7%	-0.3%	2.2%	4.6%	-1.0%	26.0%	-20.0%	17.5%														
Change in Share from 2011	%	-1.1%	-3.2%	-3.6%	-12.1%	-12.3%	-10.4%	-6.3%	-7.3%	16.8%	-6.5%	9.8%														
Avg Ann. Change in Share	%	-1.1%	-1.6%	-1.2%	-3.0%	-2.5%	-1.7%	-0.9%	-0.9%	1.9%	-0.7%	0.9%														

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		DAY VISITOR		VISITOR NUMBERS					
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		DAY VISITOR																		
An increase of 3% or more		VISITOR NUMBERS IN MILLIONS / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER					
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2	Q3	Q4
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change	32.3%	32.3%	10.1%	6.4%	3.5%	
% Change 2011 to 2022		1.0%	12.9%	73.4%	-9.5%	14.1%	21.2%	-0.3%	14.2%	0.4%	6.1%	-3.4%	7.2%			112.8%	17.2%	-7.4%	-2.0%	
% Change 2021 to 2022		156.3%	111.0%	99.3%	56.6%	18.8%	0.9%	0.2%	-10.1%	-10.6%	-7.3%	2.6%	7.1%	13.1%	Annual Change	2.9%	0.9%	0.6%	0.3%	
Average Annual Change		0.1%	1.2%	6.7%	-0.9%	1.3%	1.9%	0.0%	1.3%	0.0%	0.6%	-0.3%	0.7%	1.0%			0.405	0.729	0.945	0.365
2011	M	0.112	0.141	0.152	0.201	0.274	0.254	0.298	0.423	0.224	0.185	0.107	0.073	2.445	2.7%	0.405	0.729	0.945	0.365	
2012	M	0.118	0.148	0.175	0.180	0.260	0.276	0.323	0.454	0.228	0.174	0.108	0.067	2.511		0.440	0.716	1.005	0.350	
2013	M	0.116	0.157	0.193	0.183	0.313	0.271	0.345	0.502	0.229	0.179	0.112	0.073	2.672	6.4%	0.466	0.767	1.075	0.365	
2014	M	0.107	0.157	0.229	0.202	0.311	0.273	0.344	0.492	0.215	0.178	0.114	0.071	2.695	0.9%	0.493	0.787	1.051	0.364	
2015	M	0.127	0.183	0.245	0.206	0.328	0.285	0.354	0.562	0.248	0.210	0.118	0.082	2.949	9.4%	0.556	0.819	1.164	0.410	
2016	M	0.128	0.180	0.268	0.200	0.341	0.315	0.329	0.553	0.229	0.195	0.111	0.081	2.929	-0.7%	0.576	0.855	1.112	0.387	
2017	M	0.130	0.184	0.274	0.204	0.348	0.322	0.336	0.564	0.234	0.198	0.113	0.083	2.990	2.1%	0.588	0.873	1.134	0.394	
2018	M	0.133	0.185	0.275	0.202	0.348	0.315	0.333	0.569	0.241	0.199	0.111	0.082	2.992	0.1%	0.592	0.865	1.143	0.391	
2019	M	0.140	0.198	0.294	0.207	0.350	0.332	0.329	0.566	0.250	0.206	0.110	0.083	3.063	2.4%	0.631	0.888	1.145	0.399	
2020	M	0.130	0.176	0.114	0.013	0.036	0.058	0.092	0.308	0.154	0.123	0.039	0.052	1.296	-57.7%	0.420	0.107	0.555	0.213	
2021	M	0.044	0.076	0.132	0.116	0.263	0.306	0.297	0.537	0.251	0.211	0.101	0.073	2.408	85.8%	0.252	0.685	1.085	0.386	
2022	M	0.113	0.160	0.263	0.182	0.313	0.308	0.297	0.483	0.224	0.196	0.104	0.079	2.722	13.1%	0.536	0.803	1.005	0.378	
VISITOR NUMBERS													DAY VISITOR							
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	M	Visitor No.s by Year and Share of Total					
Day Visitor	M	2.445	2.511	2.672	2.695	2.949	2.929	2.990	2.992	3.063	3.296	2.408	2.722	3.50	100.0%	2011	2012	2013	2014	2015
All Visitor Types	M	2.786	2.858	3.032	3.056	3.305	3.282	3.359	3.380	3.456	3.512	2.719	3.145							
Share of Total	%	87.7%	87.9%	88.1%	88.2%	89.2%	89.3%	89.0%	88.5%	88.6%	85.7%	88.5%	86.5%	3.00	80.0%	2015	2016	2017	2018	2019
Annual Change in Share	%	0.2%	0.3%	0.1%	1.2%	0.0%	-0.3%	-0.6%	0.1%	-3.3%	3.3%	-2.3%	-1.4%							
Change in Share from 2011	%	0.2%	0.5%	0.5%	1.7%	1.7%	1.5%	0.9%	1.0%	-2.4%	0.9%	-1.4%	-0.1%	2.50	60.0%	2016	2017	2018	2019	2020
Avg Ann. Change in Share	%	0.2%	0.2%	0.2%	0.4%	0.3%	0.2%	0.1%	0.1%	-0.3%	0.1%	-0.1%	-0.1%							

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Report Prepared by: Aimee Towle. Date of Issue: 30/06/23

Visitor Days by Month, Year and Visitor Type for the Period 2011 to 2022

Visitor Types: *Total*

Serviced Accommodation

Non-Serviced Accommodation

SFR

Staying Visitor

Day Visitor

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL												2011 to 2022		TOTAL		VISITOR DAYS					
VISITOR DAYS BY:		MONTH AND QUARTER												CALENDAR YEAR		QUARTER					
KEY		TOTAL																			
An increase of 3% or more		VISITOR DAYS IN MILLIONS / PERCENTAGE CHANGES												TOTAL		% Change					
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2			
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			29.2%		16.9%			
% Change 2011 to 2022		8.1%	15.2%	61.6%	1.7%	21.1%	25.2%	11.4%	22.3%	13.6%	12.4%	10.0%	21.3%	18.6%		173.8%		16.7%			
% Change 2021 to 2022		268.0%	168.6%	139.7%	92.8%	22.3%	0.2%	-0.7%	-8.7%	-12.7%	-11.5%	-0.2%	1.8%	16.6%		-7.4%		-5.0%			
Average Annual Change		0.7%	1.4%	5.6%	0.2%	1.9%	2.3%	1.0%	2.0%	1.2%	1.1%	0.9%	1.9%	1.7%		2.7%		1.5%			
Annual Change		2011	M	0.191	0.198	0.210	0.285	0.364	0.342	0.391	0.527	0.301	0.240	0.154	0.148	3.351	0.599	0.992	1.218	0.542	
		2012	M	0.195	0.205	0.235	0.265	0.348	0.365	0.415	0.560	0.306	0.230	0.157	0.143	3.425	0.635	0.978	1.281	0.530	
		2013	M	0.195	0.219	0.260	0.266	0.402	0.354	0.438	0.609	0.304	0.234	0.163	0.153	3.596	5.0%	0.674	1.022	1.350	0.550
		2014	M	0.186	0.218	0.295	0.290	0.406	0.365	0.444	0.611	0.303	0.237	0.166	0.152	3.671	2.1%	0.698	1.061	1.358	0.554
		2015	M	0.207	0.244	0.308	0.289	0.422	0.378	0.457	0.686	0.331	0.264	0.168	0.159	3.913	6.6%	0.758	1.089	1.474	0.591
		2016	M	0.207	0.240	0.330	0.284	0.435	0.408	0.435	0.680	0.315	0.249	0.162	0.160	3.905	-0.2%	0.777	1.127	1.430	0.571
		2017	M	0.213	0.244	0.334	0.295	0.452	0.419	0.450	0.698	0.329	0.256	0.165	0.165	4.020	2.9%	0.792	1.165	1.476	0.587
		2018	M	0.218	0.250	0.339	0.294	0.454	0.415	0.447	0.705	0.334	0.260	0.167	0.168	4.051	0.8%	0.807	1.164	1.486	0.595
		2019	M	0.227	0.263	0.358	0.302	0.461	0.435	0.448	0.706	0.345	0.268	0.167	0.170	4.150	2.4%	0.848	1.198	1.499	0.605
		2020	M	0.244	0.245	0.150	0.020	0.045	0.066	0.163	0.431	0.264	0.180	0.047	0.082	1.935	-53.4%	0.639	0.130	0.858	0.309
		2021	M	0.056	0.085	0.142	0.151	0.360	0.428	0.439	0.706	0.391	0.305	0.170	0.176	3.408	76.1%	0.283	0.938	1.536	0.651
		2022	M	0.206	0.228	0.340	0.290	0.441	0.428	0.436	0.644	0.342	0.270	0.169	0.180	3.974	16.6%	0.774	1.159	1.421	0.619
VISITOR DAYS														TOTAL							
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Visitor Days by Year and Share of Total							
Total		M	3.351	3.425	3.596	3.671	3.913	3.905	4.020	4.051	4.150	1.935	3.408	3.974	M	Visitor Days by Year and Share of Total					
All Visitor Types		M	3.351	3.425	3.596	3.671	3.913	3.905	4.020	4.051	4.150	1.935	3.408	3.974							
Share of Total		%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%							
Annual Change in Share		%																			
Change in Share from 2011		%																			
Avg Ann. Change in Share		%																			
														M	Visitor Days by Year and Share of Total						

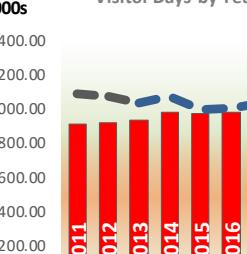
STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		SERVICED		VISITOR DAYS					
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SERVICED ACCOMMODATION																		
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER					
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2	Q3	Q4
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change	1.5%	17.0%	47.3%	44.5%	30.7%	
% Change 2011 to 2022		9.8%	18.6%	18.8%	44.0%	56.0%	42.7%	49.9%	54.6%	28.6%	29.9%	27.3%	35.7%	33.4%		409.7%	107.9%	4.7%	7.9%	
% Change 2021 to 2022		361.9%	452.4%	389.6%	389.4%	264.8%	21.7%	13.7%	-0.4%	2.1%	1.3%	6.7%	16.6%	59.9%	Annual Change	1.5%	4.3%	4.0%	2.8%	
Average Annual Change		0.9%	1.7%	1.7%	4.0%	5.1%	3.9%	4.5%	5.0%	2.6%	2.7%	2.5%	3.2%	3.0%		1.5%	4.3%	4.0%	2.8%	
2011	000s	11.7	26.7	22.8	11.9	14.8	19.6	14.5	15.6	14.8	15.1	18.2	15.1	200.9	Annual Change	61.2	46.3	44.9	48.5	
2012	000s	10.8	27.2	23.5	12.4	15.1	21.5	14.2	16.8	16.1	15.1	19.4	14.9	207.1		3.1%	61.5	49.1	47.1	49.4
2013	000s	11.3	31.4	28.8	11.6	16.3	21.7	15.6	17.8	14.7	14.2	21.1	16.8	221.2	6.8%	71.5	49.6	48.0	52.1	
2014	000s	11.3	29.0	26.8	12.9	16.4	20.5	16.5	17.8	17.7	15.8	20.5	16.7	221.9	0.3%	67.1	49.8	52.0	53.0	
2015	000s	12.5	30.0	25.9	12.6	16.6	23.2	17.0	19.9	16.7	16.5	19.1	15.5	225.5	1.6%	68.5	52.4	53.5	51.1	
2016	000s	11.4	28.7	25.2	12.6	15.9	22.0	16.9	19.4	15.7	15.1	18.7	16.1	218.0	-3.3%	65.4	50.6	52.0	50.0	
2017	000s	12.4	27.8	23.6	14.7	19.6	23.6	18.4	20.9	17.5	16.4	19.3	17.2	231.3	6.1%	63.8	57.9	56.8	52.8	
2018	000s	14.3	32.2	26.6	16.5	23.1	27.5	20.9	24.6	19.4	19.2	22.3	19.9	266.6	15.3%	73.1	67.2	64.9	61.4	
2019	000s	14.3	31.9	26.7	16.5	23.3	27.7	21.1	24.5	19.2	19.5	22.7	19.4	266.9	0.1%	73.0	67.5	64.8	61.6	
2020	000s	15.3	32.0	11.6	1.4	2.3	2.4	5.0	12.0	9.4	8.9	3.0	2.3	105.6	-60.4%	58.9	6.1	26.4	14.2	
2021	000s	2.8	5.7	5.5	3.5	6.3	23.0	19.2	24.3	18.6	19.4	21.7	17.6	167.6	58.7%	14.0	32.8	62.0	58.8	
2022	000s	12.9	31.6	27.1	17.1	23.1	27.9	21.8	24.2	19.0	19.7	23.2	20.5	268.1	59.9%	71.6	68.1	65.0	63.4	
VISITOR DAYS														SERVICED ACCOMMODATION						
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	000s	Visitor Days by Year and Share of Total					
Serviced	000s	200.9	207.1	221.2	221.9	225.5	218.0	231.3	266.6	266.9	105.6	167.6	268.1		Annual Change	300.00	8.0%			
All Visitor Types	M	3.4	3.4	3.6	3.7	3.9	3.9	4.0	4.1	4.1	1.9	3.4	4.0	Annual Change	200.00	6.0%				
Share of Total	%	6.0%	6.0%	6.2%	6.0%	5.8%	5.6%	5.8%	6.6%	6.4%	5.5%	4.9%	6.7%		150.00	4.0%				
Annual Change in Share	%	0.9%	1.7%	-1.7%	-4.7%	-3.1%	3.1%	14.4%	-2.3%	-15.2%	-9.9%	37.2%		Annual Change	100.00	2.0%				
Change in Share from 2011	%	0.9%	2.6%	0.8%	-3.9%	-6.9%	-4.0%	9.8%	7.3%	-9.0%	-17.9%	12.5%			50.00	0.0%				
Avg Ann. Change in Share	%	0.9%	1.3%	0.3%	-1.0%	-1.4%	-0.7%	1.4%	0.9%	-1.0%	-1.8%	1.1%								



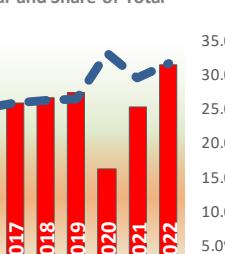
STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		NON-SERVICED		VISITOR DAYS									
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER									
KEY		NON-SERVICED ACCOMMODATION																						
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER									
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2	Q3	Q4				
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change		117.2%	57.4%	89.5%	115.5%					
% Change 2011 to 2022		152.5%	105.2%	108.7%	59.3%	62.8%	51.3%	88.3%	94.8%	84.6%	65.7%	139.1%	232.7%	82.8%		4253.5%	33.7%	0.4%	3.8%					
% Change 2021 to 2022		4135.0%	3913.9%	4550.2%	255.1%	30.1%	2.2%	7.2%	4.7%	-9.8%	-13.3%	5.8%	45.0%	21.7%	Annual Change		10.7%	5.2%	8.1%	10.5%				
Average Annual Change		13.9%	9.6%	9.9%	5.4%	5.7%	4.7%	8.0%	8.6%	7.7%	6.0%	12.6%	21.2%	7.5%			20.4	96.2	113.5	29.9				
2011	000s	4.4	5.9	10.1	19.9	37.7	38.7	34.6	42.4	36.6	16.3	8.3	5.3	260.0	Annual Change	20.4	96.2	113.5	29.9					
2012	000s	4.9	6.0	10.9	19.9	35.9	37.6	33.6	42.7	35.9	16.6	8.7	6.0	258.8		-0.5%	21.8	93.5	112.3	31.3				
2013	000s	4.8	5.8	11.1	18.4	35.1	31.7	33.4	42.8	34.8	16.3	8.9	6.0	249.0	-3.8%	21.7	85.1	111.0	31.2					
2014	000s	5.1	6.2	12.2	20.5	40.8	41.3	39.2	52.7	42.9	17.9	10.2	6.6	295.6	18.7%	23.5	102.6	134.8	34.7					
2015	000s	4.3	6.4	10.5	17.4	38.5	38.6	40.3	54.4	40.1	13.8	10.4	6.5	281.1	-4.9%	21.2	94.5	134.7	30.7					
2016	000s	4.6	6.6	10.6	17.8	39.3	39.7	41.9	57.4	42.6	14.8	11.2	7.0	293.6	4.4%	21.9	96.8	141.9	33.0					
2017	000s	5.1	7.8	10.8	19.8	43.2	41.8	46.4	60.8	48.9	16.0	11.7	7.9	320.3	9.1%	23.7	104.9	156.1	35.7					
2018	000s	4.9	7.5	10.3	18.9	42.2	40.3	44.0	59.3	45.2	16.0	11.4	7.3	307.4	-4.0%	22.7	101.4	148.5	34.8					
2019	000s	5.6	8.0	10.9	22.0	46.7	42.9	48.9	63.0	47.0	16.3	12.8	8.1	332.4	8.1%	24.5	111.7	158.9	37.3					
2020	000s	10.8	10.4	9.1	1.0	2.9	3.1	36.7	64.9	67.0	24.1	2.0	7.2	239.2	-28.1%	30.2	7.0	168.6	33.3					
2021	000s	0.3	0.3	0.5	8.9	47.1	57.2	60.7	78.9	74.8	31.2	18.8	12.1	390.7	63.4%	1.0	113.2	214.4	62.1					
2022	000s	11.2	12.1	21.0	31.6	61.3	58.5	65.1	82.6	67.5	27.1	19.9	17.5	475.3	21.7%	44.3	151.4	215.2	64.4					
VISITOR DAYS														NON-SERVICED ACCOMMODATION										
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	000s	Visitor Days by Year and Share of Total									
Non-Serviced	000s	260.0	258.8	249.0	295.6	281.1	293.6	320.3	307.4	332.4	239.2	390.7	475.3		500.0	14.0%	12.0%	10.0%	8.0%	6.0%	4.0%	2.0%	0.0%	
All Visitor Types	M	3.4	3.4	3.6	3.7	3.9	3.9	4.0	4.1	4.1	1.9	3.4	4.0		300.0	300.0	300.0	300.0	300.0	300.0	300.0	300.0	300.0	
Share of Total	%	7.8%	7.6%	6.9%	8.1%	7.2%	7.5%	8.0%	7.6%	8.0%	12.4%	11.5%	12.0%		200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	
Annual Change in Share	%	-2.6%	-8.4%	16.3%	-10.8%	4.6%	6.0%	-4.8%	5.6%	54.3%	-7.2%	4.3%		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0		
Change in Share from 2011	%	-2.6%	-10.7%	3.8%	-7.4%	-3.1%	2.7%	-2.2%	3.2%	59.3%	47.8%	54.2%		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Avg Ann. Change in Share	%	-2.6%	-5.4%	1.3%	-1.8%	-0.6%	0.4%	-0.3%	0.4%	6.6%	4.8%	4.9%		Non-Serviced 000s	Share of Total %	Report Prepared by: Aimee Towle. Date of Issue: 30/06/23	Page 33							

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		SFR		VISITOR DAYS									
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER									
KEY		SFR																						
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER									
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2		Q3		Q4		
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change	8.8% 676.3%	Q1		Q2		Q3		Q4		
% Change 2011 to 2022		10.2%	3.1%	10.9%	12.9%	16.4%	13.8%	17.6%	18.7%	19.0%	13.2%	12.2%	15.8%			8.8% 676.3%		14.2% 27.4%		18.4% -21.7%		14.5% -21.9%		
% Change 2021 to 2022		684.2%	647.4%	684.1%	170.3%	-0.2%	-19.4%	-17.1%	-16.6%	-35.0%	-36.5%	-19.8%	-14.1%	15.0%	Annual Change	0.8% 113.3%	Q1		Q2		Q3		Q4	
Average Annual Change		0.9%	0.3%	1.0%	1.2%	1.5%	1.3%	1.6%	1.7%	1.7%	1.2%	1.1%	1.4%	1.3%			0.8% 113.7%		1.3% 124.2%		1.7% 124.8%		1.3% 101.5%	
2011	000s	62.4	24.2	25.5	52.9	37.2	29.7	43.7	45.9	25.7	24.2	20.1	54.5	445.8	0.4%	112.1		119.8		115.2		98.7		
2012	000s	61.9	24.0	25.8	53.4	37.0	29.8	43.7	46.4	25.9	24.3	20.5	55.1	447.7		111.7		120.2		116.0		99.9		
2013	000s	62.8	25.5	27.3	52.9	37.3	29.5	44.1	46.9	25.6	24.2	21.0	56.7	453.9	1.4%	115.6		119.6		116.7		102.0		
2014	000s	63.0	24.9	26.7	53.7	37.9	29.9	45.1	48.2	26.9	24.6	21.0	56.8	458.6		114.6		121.5		120.1		102.4		
2015	000s	63.0	24.0	26.3	53.5	38.4	30.7	45.9	49.4	27.0	24.5	20.4	54.7	457.7	-0.2%	113.3		122.5		122.3		99.6		
2016	000s	63.0	24.1	26.6	54.2	38.9	31.0	46.8	50.4	27.6	24.8	20.7	56.0	464.1		113.7		124.2		124.8		101.5		
2017	000s	65.1	24.4	26.5	56.2	40.8	31.9	48.5	51.8	29.0	25.5	21.2	57.6	478.4	1.4%	115.9		128.9		129.3		104.3		
2018	000s	66.6	25.2	27.0	56.6	41.2	32.2	48.5	52.1	28.7	26.0	21.6	59.3	485.2		118.9		130.0		129.3		107.0		
2019	000s	66.8	25.1	27.0	57.4	41.7	32.4	49.1	52.4	28.6	26.0	21.8	59.1	487.4	0.5%	118.9		131.5		130.1		107.0		
2020	000s	87.6	26.7	14.9	3.6	3.2	2.5	29.4	46.2	33.2	24.0	3.1	20.5	294.9		-39.5%		129.2		9.3		108.8		
2021	000s	8.8	3.3	3.6	22.1	43.4	41.9	61.9	65.4	47.0	43.1	28.1	73.4	442.0	1.4%	49.9%		15.7		107.4		174.3		
2022	000s	68.7	25.0	28.3	59.8	43.3	33.7	51.3	54.5	30.6	27.3	22.5	63.1	508.2		15.0%		122.0		136.8		136.4		
VISITOR DAYS														SFR										
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	000s	Visitor Days by Year and Share of Total									
SFR		445.8	447.7	453.9	458.6	457.7	464.1	478.4	485.2	487.4	294.9	442.0	508.2	600.00	20.0%									
000s		3.4	3.4	3.6	3.7	3.9	3.9	4.0	4.1	4.1	1.9	3.4	4.0		15.0%									
All Visitor Types		13.3%	13.1%	12.6%	12.5%	11.7%	11.9%	11.9%	12.0%	11.7%	15.2%	13.0%	12.8%	500.00	10.0%									
M		-1.7%	-3.5%	-1.0%	-6.4%	1.6%	0.1%	0.6%	-1.9%	29.7%	-14.9%	-1.4%	-0.4%		5.0%									
Share of Total		13.1%	12.6%	12.5%	11.7%	11.9%	11.9%	12.0%	11.7%	15.2%	13.0%	12.8%	12.8%	400.00	0.0%									
%		-1.7%	-5.1%	-6.1%	-12.1%	-10.7%	-10.5%	-10.0%	-11.7%	14.5%	-2.5%	-3.9%	-0.4%		200.00									
Annual Change in Share		-1.7%	-5.1%	-6.1%	-12.1%	-10.7%	-10.5%	-10.0%	-11.7%	14.5%	-2.5%	-3.9%	-0.4%	100.00	0.0%									
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%		0.00									
Change in Share from 2011		-1.7%	-5.1%	-6.1%	-12.1%	-10.7%	-10.5%	-10.0%	-11.7%	14.5%	-2.5%	-3.9%	-0.4%	2011	0.00									
Avg Ann. Change in Share		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%		2012									
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2013										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2014										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2015										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2016										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2017										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2018										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2019										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2020										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2021										
%		-1.7%	-2.6%	-2.0%	-3.0%	-2.1%	-1.8%	-1.4%	-1.5%	1.6%	-0.3%	-0.4%	-0.4%	2022										

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		STAYING VISITOR		VISITOR DAYS																				
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER																				
KEY		STAYING VISITOR																																	
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES											TOTAL		QUARTER																				
Less than 3% change		Q1			Q2			Q3			Q4			% Change		Q1		Q2		Q3		Q4													
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Annual Change		22.8%		35.9%		52.2%		36.0%											
% Change 2011 to 2022		18.2%	21.0%	30.9%	28.1%	42.4%	36.7%	49.0%	55.1%	52.0%	33.1%	40.7%	35.1%	38.0%		673.0%		40.6%		-7.6%		-9.3%													
% Change 2021 to 2022		685.6%	633.5%	696.3%	214.4%	31.9%	-1.5%	-2.5%	-4.3%	-16.6%	-21.0%	-4.4%	-1.9%	25.1%				2.1%		3.3%		4.7%		3.3%											
Average Annual Change		1.7%	1.9%	2.8%	2.6%	3.9%	3.3%	4.5%	5.0%	4.7%	3.0%	3.7%	3.2%	3.5%				2.1%		3.3%		4.7%		3.3%											
2011	000s	78.5	56.8	58.3	84.7	89.7	87.9	92.8	103.9	77.0	55.6	46.6	74.9	906.7		193.7		262.3		273.7		177.1													
2012	000s	77.5	57.3	60.1	85.7	88.0	89.0	91.5	105.9	77.9	56.0	48.6	75.9	913.6		0.8%		195.0		262.7		275.4		180.6											
2013	000s	78.9	62.7	67.2	82.8	88.6	82.9	93.1	107.5	75.1	54.8	51.0	79.5	924.1		1.2%		208.8		254.3		275.7		185.3											
2014	000s	79.4	60.0	65.6	87.1	95.1	91.7	100.8	118.7	87.5	58.3	51.6	80.1	976.1		5.6%		205.1		273.9		307.0		190.1											
2015	000s	79.8	60.4	62.7	83.5	93.5	92.5	103.2	123.7	83.7	54.8	49.9	76.6	964.3		-1.2%		202.9		269.5		310.6		181.4											
2016	000s	79.1	59.5	62.4	84.7	94.1	92.8	105.6	127.2	85.9	54.7	50.6	79.2	975.6		1.2%		201.0		271.6		318.7		184.4											
2017	000s	82.6	59.9	60.9	90.7	103.6	97.4	113.2	133.5	95.4	57.9	52.1	82.7	1,030.0		5.6%		203.4		291.7		342.1		192.8											
2018	000s	85.8	64.9	63.9	92.0	106.6	99.9	113.4	136.1	93.2	61.2	55.3	86.6	1,059.1		2.8%		214.7		298.6		342.7		203.1											
2019	000s	86.8	65.0	64.5	95.9	111.8	103.0	119.1	139.9	94.9	61.8	57.4	86.6	1,086.7		2.6%		216.3		310.7		353.8		205.8											
2020	000s	113.6	69.1	35.5	6.0	8.4	8.0	71.0	123.1	109.6	56.9	8.2	30.0	639.6		-41.1%		218.3		22.5		303.7		95.2											
2021	000s	11.8	9.4	9.6	34.5	96.9	122.1	141.8	168.5	140.4	93.7	68.6	103.1	1,000.3		56.4%		30.8		253.4		450.7		265.4											
2022	000s	92.8	68.7	76.3	108.5	127.7	120.2	138.3	161.2	117.0	74.1	65.6	101.1	1,251.5		25.1%		237.9		356.4		416.5		240.8											
VISITOR DAYS														STAYING VISITOR																					
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	000s		Visitor Days by Year and Share of Total																			
Staying Visitor	000s	906.7	913.6	924.1	976.1	964.3	975.6	1,030.0	1,059.1	1,086.7	639.6	1,000.3	1,251.5	1,400.00																					
All Visitor Types	M	3.4	3.4	3.6	3.7	3.9	3.9	4.0	4.1	4.1	1.9	3.4	4.0	1,200.00																					
Share of Total	%	27.1%	26.7%	25.7%	26.6%	24.6%	25.0%	25.6%	26.1%	26.2%	33.0%	29.4%	31.5%	35.0%																					
Annual Change in Share	%	-1.4%	-3.7%	3.5%	-7.3%	1.4%	2.5%	2.0%	0.2%	26.2%	-11.2%	7.3%	30.0%																						
Change in Share from 2011	%	-1.4%	-5.0%	-1.7%	-8.9%	-7.7%	-5.3%	-3.4%	-3.2%	22.2%	8.5%	16.4%	25.0%																						
Avg Ann. Change in Share	%	-1.4%	-2.5%	-0.6%	-2.2%	-1.5%	-0.9%	-0.5%	-0.4%	2.5%	0.8%	1.5%	20.0%																						



Staying Visitor 000s

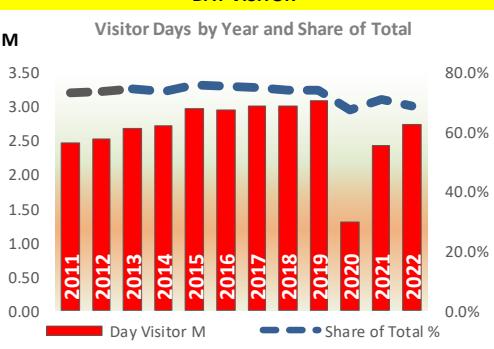


Share of Total %

Report Prepared by: Aimee Towle. Date of Issue: 30/06/23

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STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL												2011 to 2022		DAY VISITOR		VISITOR DAYS			
VISITOR DAYS BY:		MONTH AND QUARTER												CALENDAR YEAR		QUARTER			
KEY		DAY VISITOR																	
An increase of 3% or more		VISITOR DAYS IN MILLIONS / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER			
Less than 3% change		Q1			Q2			Q3			Q4								
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change	2.9%	Q1			
% Change 2011 to 2022		1.0%	12.9%	73.4%	-9.5%	14.1%	21.2%	-0.3%	14.2%	0.4%	6.1%	-3.4%	7.2%	11.4%		32.3%	10.1%	6.4%	3.5%
% Change 2021 to 2022		156.3%	111.0%	99.3%	56.6%	18.8%	0.9%	0.2%	-10.1%	-10.6%	-7.3%	2.6%	7.1%	13.1%	Annual Change	112.8%	17.2%	-7.4%	-2.0%
Average Annual Change		0.1%	1.2%	6.7%	-0.9%	1.3%	1.9%	0.0%	1.3%	0.0%	0.6%	-0.3%	0.7%	1.0%		2.9%	0.9%	0.6%	0.3%
2011	M	0.112	0.141	0.152	0.201	0.274	0.254	0.298	0.423	0.224	0.185	0.107	0.073	2.445	Annual Change	0.405	0.729	0.945	0.365
2012	M	0.118	0.148	0.175	0.180	0.260	0.276	0.323	0.454	0.228	0.174	0.108	0.067	2.511		0.440	0.716	1.005	0.350
2013	M	0.116	0.157	0.193	0.183	0.313	0.271	0.345	0.502	0.229	0.179	0.112	0.073	2.672	6.4%	0.466	0.767	1.075	0.365
2014	M	0.107	0.157	0.229	0.202	0.311	0.273	0.344	0.492	0.215	0.178	0.114	0.071	2.695	0.9%	0.493	0.787	1.051	0.364
2015	M	0.127	0.183	0.245	0.206	0.328	0.285	0.354	0.562	0.248	0.210	0.118	0.082	2.949	9.4%	0.556	0.819	1.164	0.410
2016	M	0.128	0.180	0.268	0.200	0.341	0.315	0.329	0.553	0.229	0.195	0.111	0.081	2.929	-0.7%	0.576	0.855	1.112	0.387
2017	M	0.130	0.184	0.274	0.204	0.348	0.322	0.336	0.564	0.234	0.198	0.113	0.083	2.990	2.1%	0.588	0.873	1.134	0.394
2018	M	0.133	0.185	0.275	0.202	0.348	0.315	0.333	0.569	0.241	0.199	0.111	0.082	2.992	0.1%	0.592	0.865	1.143	0.391
2019	M	0.140	0.198	0.294	0.207	0.350	0.332	0.329	0.566	0.250	0.206	0.110	0.083	3.063	2.4%	0.631	0.888	1.145	0.399
2020	M	0.130	0.176	0.114	0.013	0.036	0.058	0.092	0.308	0.154	0.123	0.039	0.052	1.296	-57.7%	0.420	0.107	0.555	0.213
2021	M	0.044	0.076	0.132	0.116	0.263	0.306	0.297	0.537	0.251	0.211	0.101	0.073	2.408	85.8%	0.252	0.685	1.085	0.386
2022	M	0.113	0.160	0.263	0.182	0.313	0.308	0.297	0.483	0.224	0.196	0.104	0.079	2.722	13.1%	0.536	0.803	1.005	0.378
VISITOR DAYS														DAY VISITOR					
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	M	Visitor Days by Year and Share of Total				
Day Visitor	M	2.445	2.511	2.672	2.695	2.949	2.929	2.990	2.992	3.063	1.296	2.408	2.722	Annual Change	80.0%				
All Visitor Types	M	3.351	3.425	3.596	3.671	3.913	3.905	4.020	4.051	4.150	1.935	3.408	3.974						
Share of Total	%	72.9%	73.3%	74.3%	73.4%	75.4%	75.0%	74.4%	73.9%	73.8%	67.0%	70.6%	68.5%	Annual Change	60.0%				
Annual Change in Share	%	0.5%	1.3%	-1.2%	2.6%	-0.5%	-0.8%	-0.7%	-0.1%	-9.3%	5.5%	-3.0%							
Change in Share from 2011	%	0.5%	1.9%	0.6%	3.3%	2.8%	2.0%	1.2%	1.2%	-8.2%	-3.1%	-6.1%	Annual Change	40.0%					
Avg Ann. Change in Share	%	0.5%	0.9%	0.2%	0.8%	0.6%	0.3%	0.2%	0.1%	-0.9%	-0.3%	-0.6%							



Day Visitor M

Share of Total %

Direct and Total Employment by Month, Year and Visitor Type for the Period 2011 to 2022

Visitor Types: *Total*

Serviced Accommodation

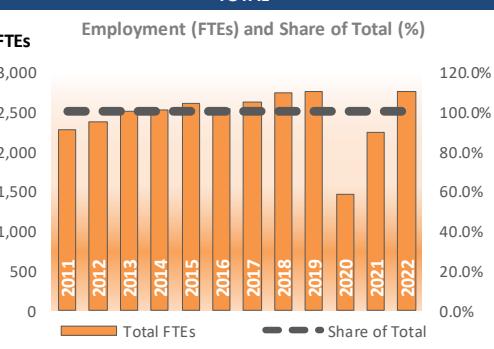
Non-Serviced Accommodation

SFR

Staying Visitor

Day Visitor

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL												2011 to 2022		TOTAL		TOTAL EMPLOYMENT													
EMPLOYMENT BY:		MONTH AND QUARTER												CALENDAR YEAR		QUARTER													
KEY		TOTAL																											
An increase of 3% or more		TOTAL EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES												TOTAL		% Change		Q1		Q2		Q3		Q4					
Less than 3% change		Q1			Q2			Q3			Q4					Annual Change		Q1		Q2		Q3		Q4					
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			26.4%		20.5%		20.6%		18.7%							
% Change 2011 to 2022		13.9%	18.7%	45.5%	10.2%	23.7%	26.1%	16.7%	25.4%	18.1%	16.7%	16.9%	23.0%	21.4%		197.5%		33.9%		-4.6%		-3.1%							
% Change 2021 to 2022		249.3%	199.0%	167.3%	116.3%	37.1%	1.8%	0.8%	-5.0%	-9.8%	-9.6%	0.7%	2.1%	23.4%															
Average Annual Change		1.3%	1.7%	4.1%	0.9%	2.2%	2.4%	1.5%	2.3%	1.6%	1.5%	1.5%	2.1%	1.9%		2.4%		1.9%		1.9%		1.7%							
2011	FTEs	1,790	1,850	1,907	2,294	2,711	2,614	2,880	3,600	2,372	2,036	1,585	1,587	2,269		1,849		2,540		2,951		1,736							
2012	FTEs	1,873	1,953	2,106	2,257	2,699	2,815	3,070	3,863	2,467	2,036	1,653	1,607	2,366		4.3%		1,977		2,590		3,133							
2013	FTEs	1,910	2,096	2,321	2,299	3,053	2,813	3,263	4,214	2,497	2,093	1,734	1,704	2,500		5.6%		2,109		2,722		3,325							
2014	FTEs	1,841	2,046	2,465	2,418	3,058	2,849	3,280	4,193	2,500	2,103	1,731	1,683	2,514		0.6%		2,117		2,775		3,324							
2015	FTEs	1,945	2,178	2,505	2,386	3,104	2,899	3,320	4,560	2,614	2,225	1,724	1,706	2,597		3.3%		2,209		2,797		3,498							
2016	FTEs	1,886	2,099	2,561	2,306	3,109	2,991	3,147	4,461	2,473	2,087	1,640	1,670	2,536		-2.4%		2,182		2,802		3,360							
2017	FTEs	1,933	2,125	2,585	2,386	3,239	3,076	3,253	4,591	2,574	2,139	1,667	1,710	2,606		2.8%		2,214		2,900		3,473							
2018	FTEs	2,058	2,264	2,718	2,486	3,377	3,178	3,355	4,776	2,700	2,262	1,771	1,820	2,730		4.8%		2,347		3,013		3,610							
2019	FTEs	2,084	2,313	2,796	2,512	3,388	3,255	3,337	4,735	2,735	2,286	1,765	1,814	2,752		0.8%		2,398		3,052		3,602							
2020	FTEs	2,276	2,270	1,524	321	512	600	1,502	3,213	2,256	1,713	588	776	1,463		-46.8%		2,024		478		2,324							
2021	FTEs	584	735	1,038	1,169	2,445	3,238	3,334	4,753	3,106	2,629	1,839	1,912	2,232		52.6%		785		2,284		3,731							
2022	FTEs	2,039	2,196	2,775	2,528	3,352	3,297	3,360	4,513	2,802	2,377	1,853	1,951	2,754		23.4%		2,337		3,059		3,558							
EMPLOYMENT														TOTAL				Employment (FTEs) and Share of Total (%)											
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	FTEs															
Total	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754																
Total Employment	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754																
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%																
Annual Change in Share	%																												
Change in Share from 2011	%																												
Avg Ann. Change in Share	%																												

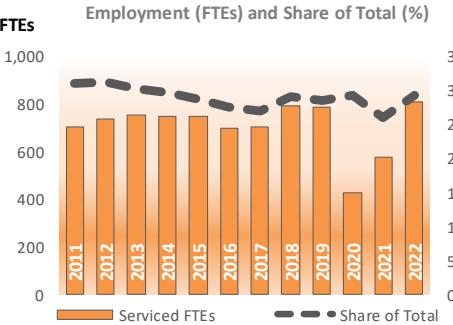


The chart displays two data series: 'Total FTEs' (orange bars) and 'Share of Total' (black line with dots). The Y-axis represents the number of FTEs from 0 to 3,000, and the X-axis represents the years from 2011 to 2022. The 'Share of Total' line starts at 100.0% in 2011 and remains relatively stable around 100.0% until 2015, then shows a slight downward trend to approximately 90.0% by 2022. The 'Total FTEs' bars show a general upward trend from about 2,200 in 2011 to over 2,700 in 2022.

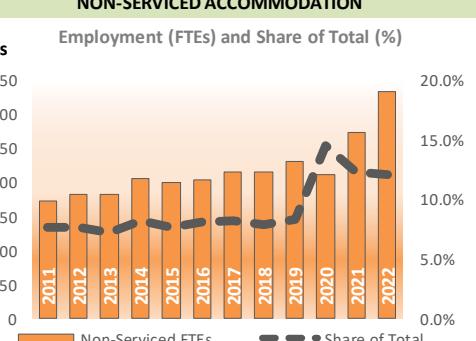
STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		SERVICED		DIRECT EMPLOYMENT					
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SERVICED ACCOMMODATION																		
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER					
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2	Q3	Q4
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	14.6%	14.6%	12.6%	17.3%	15.4%	13.4%	
% Change 2011 to 2022		11.0%	13.3%	13.2%	15.6%	18.5%	17.8%	16.0%	17.1%	12.8%	13.0%	13.2%	14.0%							
% Change 2021 to 2022		190.2%	231.3%	220.0%	192.4%	141.2%	4.6%	2.5%	0.0%	0.4%	0.2%	1.4%	2.8%	39.6%	Annual Change	214.1%	72.1%	0.9%	1.5%	
Average Annual Change		1.0%	1.2%	1.2%	1.4%	1.7%	1.6%	1.5%	1.6%	1.2%	1.2%	1.2%	1.3%	1.3%						
2011	FTEs	663	773	742	661	683	719	690	699	691	694	718	694	702	4.6%	726	687	693	702	
2012	FTEs	691	813	786	695	715	765	711	729	724	716	749	714	734		763	725	721	726	
2013	FTEs	701	854	835	694	731	775	727	744	720	716	771	736	750	2.2%	797	734	731	741	
2014	FTEs	689	822	804	697	725	758	727	737	736	721	759	728	742	-1.1%	772	727	733	736	
2015	FTEs	697	828	797	694	726	777	730	751	727	724	746	719	743	0.1%	774	732	736	730	
2016	FTEs	646	773	747	651	677	724	685	703	676	671	699	680	694	-6.5%	722	684	688	683	
2017	FTEs	650	765	733	664	702	734	694	713	687	678	701	685	701	0.9%	716	700	698	688	
2018	FTEs	731	866	823	744	795	830	780	807	768	765	791	772	789	12.6%	807	790	785	776	
2019	FTEs	723	855	815	736	788	823	773	798	758	759	785	760	781	-1.0%	798	782	776	768	
2020	FTEs	756	853	590	169	203	182	398	529	521	513	223	182	427	-45.4%	733	185	483	306	
2021	FTEs	254	264	263	261	335	809	782	818	777	782	801	770	576	35.1%	260	469	792	784	
2022	FTEs	736	876	840	764	809	847	801	818	780	784	812	791	805	39.6%	817	807	800	796	
EMPLOYMENT														SERVICED ACCOMMODATION						
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Employment (FTEs) and Share of Total (%)						
Serviced	FTEs	702	734	750	742	743	694	701	789	781	427	576	805	FTEs						
Total Employment	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754	Employment (FTEs) and Share of Total (%)						
Share of Total	%	30.9%	31.0%	30.0%	29.5%	28.6%	27.4%	26.9%	28.9%	28.4%	29.2%	25.8%	29.2%	FTEs						
Annual Change in Share	%	0.2%	-3.2%	-1.7%	-3.1%	-4.3%	-1.8%	7.5%	-1.8%	2.8%	-11.5%	13.2%	Employment (FTEs) and Share of Total (%)							
Change in Share from 2011	%	0.2%	-3.0%	-4.6%	-7.6%	-11.5%	-13.1%	-6.6%	-8.3%	-5.7%	-16.5%	-5.5%	FTEs							
Avg Ann. Change in Share	%	0.2%	-1.5%	-1.5%	-1.9%	-2.3%	-2.2%	-0.9%	-1.0%	-0.6%	-1.7%	-0.5%	Employment (FTEs) and Share of Total (%)							

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Report Prepared by: Aimee Towle. Date of Issue: 30/06/23



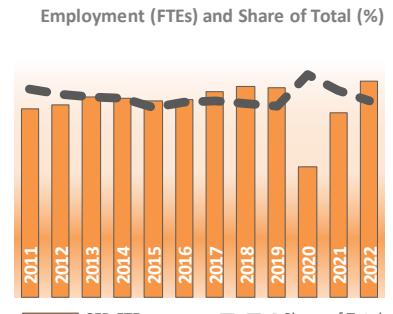
STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022			NON-SERVICED		DIRECT EMPLOYMENT									
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER										
KEY		NON-SERVICED ACCOMMODATION																							
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER									
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2		Q3		Q4			
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Annual Change		Q1		Q2		Q3		Q4	
% Change 2011 to 2022		120.8%	122.4%	105.8%	76.7%	73.3%	65.3%	91.9%	106.9%	88.8%	80.1%	125.3%	150.3%	93.3%		115.1%	71.1%	96.3%	111.9%						
% Change 2021 to 2022		709.7%	781.4%	903.4%	111.2%	17.4%	1.6%	4.8%	9.1%	-14.6%	-24.1%	2.6%	11.9%	21.7%		801.4%	24.3%	-0.8%	-7.2%						
Average Annual Change		11.0%	11.1%	9.6%	7.0%	6.7%	5.9%	8.4%	9.7%	8.1%	7.3%	11.4%	13.7%	8.5%		10.5%	6.5%	8.8%	10.2%						
2011	FTEs	82	88	119	167	253	257	236	272	246	150	105	88	172		96	225	252	114						
2012	FTEs	93	98	131	176	255	263	242	285	254	160	115	100	181	5.2%	107	231	260	125						
2013	FTEs	94	98	134	172	256	242	246	292	254	162	118	102	181	0.0%	108	224	264	128						
2014	FTEs	99	104	145	190	290	292	280	345	300	175	129	110	205	13.3%	116	257	308	138						
2015	FTEs	99	113	137	173	275	276	283	350	282	154	136	118	200	-2.6%	116	241	305	136						
2016	FTEs	100	115	138	174	277	279	289	362	292	157	139	120	203	1.9%	117	243	314	139						
2017	FTEs	102	120	139	183	297	290	311	379	323	163	142	124	214	5.4%	120	257	338	143						
2018	FTEs	102	121	141	184	298	289	306	380	312	168	144	121	214	-0.3%	121	257	333	144						
2019	FTEs	110	129	149	205	325	308	334	402	326	175	156	131	229	7.2%	129	279	354	154						
2020	FTEs	166	189	178	49	85	86	305	472	488	267	114	139	211	-7.7%	178	73	421	173						
2021	FTEs	22	22	24	140	373	418	432	516	545	356	230	196	273	29.1%	23	310	498	261						
2022	FTEs	181	196	245	295	438	425	453	563	465	271	236	220	332	21.7%	207	386	494	242						
EMPLOYMENT														NON-SERVICED ACCOMMODATION											
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Employment (FTEs) and Share of Total (%)											
Non-Serviced	FTEs	172	181	181	205	200	203	214	214	229	211	273	332	FTEs											
Total Employment	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754	Employment (FTEs) and Share of Total (%)											
Share of Total	%	7.6%	7.6%	7.2%	8.2%	7.7%	8.0%	8.2%	7.8%	8.3%	14.5%	12.2%	12.1%	FTEs											
Annual Change in Share	%			0.9%	-5.3%	12.6%	-5.8%	4.4%	2.5%	-4.8%	6.4%	73.6%	-15.4%	-1.4%	Employment (FTEs) and Share of Total (%)										
Change in Share from 2011	%			0.9%	-4.5%	7.6%	1.4%	5.9%	8.5%	3.3%	9.9%	90.8%	61.5%	59.3%	FTEs										
Avg Ann. Change in Share	%			0.9%	-2.2%	2.5%	0.3%	1.2%	1.4%	0.5%	1.2%	10.1%	6.1%	5.4%	Employment (FTEs) and Share of Total (%)										



STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		SFR		DIRECT EMPLOYMENT												
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER												
KEY		SFR																									
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER												
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2	Q3	Q4							
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change	9.8%	9.8%	15.3%	19.4%	15.5%								
% Change 2011 to 2022		11.2%	4.0%	12.0%	13.9%	17.5%	14.8%	18.7%	19.8%	20.1%	14.2%	13.2%	16.9%			649.2%	30.0%	-20.2%	-20.3%								
% Change 2021 to 2022		656.7%	621.3%	656.7%	175.8%	1.8%	-17.8%	-15.4%	-15.0%	-33.6%	-35.2%	-18.2%	-12.3%	17.1%	Annual Change	0.9%	1.4%	1.8%	1.4%								
Average Annual Change		1.0%	0.4%	1.1%	1.3%	1.6%	1.3%	1.7%	1.8%	1.8%	1.3%	1.2%	1.5%	1.4%			198	212	204	175							
2011	FTEs	331	129	135	281	197	157	232	244	136	128	106	289	197	Annual Change	2.2%	201	216	209	180							
2012	FTEs	334	130	139	288	200	161	236	251	140	131	111	297	202			213	221	215	188							
2013	FTEs	348	141	151	293	206	163	244	260	142	134	116	314	209	3.9%	-0.3%	209	221	219	187							
2014	FTEs	345	136	146	293	207	163	246	263	147	135	115	311	209	204		220	220	179								
2015	FTEs	340	129	142	289	207	165	248	267	146	132	110	295	206	-1.5%	0.6%	203	222	223	181							
2016	FTEs	337	129	142	290	208	166	250	270	148	133	111	300	207	208		232	232	187								
2017	FTEs	351	131	143	303	220	172	261	279	156	137	114	311	215	3.8%	2.9%	217	237	236	195							
2018	FTEs	365	138	148	310	225	176	265	285	157	142	118	325	221	214		237	234	193								
2019	FTEs	361	135	146	310	226	175	266	283	155	141	118	320	220	-0.7%	-38.0%	232	17	205	90							
2020	FTEs	472	144	80	19	17	14	162	263	189	137	18	117	136	194		42.4%	29	188	305							
2021	FTEs	49	19	20	116	228	220	325	343	247	226	147	385	194	42.4%	17.1%	218	244	243	202							
2022	FTEs	368	134	151	320	232	181	275	292	164	146	121	338	227	218		244	243	202								
EMPLOYMENT																	SFR										
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	FTEs	Employment (FTEs) and Share of Total (%)												
SFR	FTEs	197	202	209	209	206	207	215	221	220	136	194	227		2269	2366	2500	2514	2597	2536	2606	2730	2752	1463	2232	2754	10.0%
Total Employment	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754	Share of Total	8.7%	8.5%	8.4%	8.3%	7.9%	8.2%	8.2%	8.1%	8.0%	9.3%	8.7%	8.2%	10.0%
Share of Total	%	8.7%	8.5%	8.4%	8.3%	7.9%	8.2%	8.2%	8.2%	8.1%	8.0%	8.7%	8.2%		-2.0%	-1.6%	-0.8%	-4.6%	3.0%	1.0%	-1.7%	-1.5%	16.6%	-6.7%	-5.1%	10.0%	
Annual Change in Share	%													Avg Ann. Change in Share	-2.0%	-3.6%	-4.4%	-8.8%	-6.0%	-5.1%	-6.8%	-8.2%	7.0%	-0.1%	-5.2%	-0.5%	10.0%
Change in Share from 2011	%														-2.0%	-1.8%	-1.5%	-2.2%	-1.2%	-0.9%	-1.0%	-1.0%	0.8%	0.0%	-0.5%	10.0%	
Avg Ann. Change in Share	%														-2.0%	-1.8%	-1.5%	-2.2%	-1.2%	-0.9%	-1.0%	-1.0%	0.8%	0.0%	-0.5%	10.0%	

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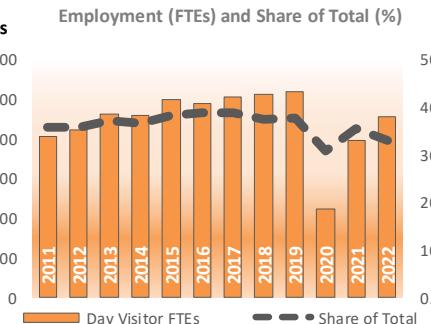


STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		STAYING VISITOR		DIRECT EMPLOYMENT					
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		STAYING VISITOR																		
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER					
Less than 3% change		Q1			Q2			Q3			Q4									
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change	2.0%	Q1	Q2	Q3	Q4	
% Change 2011 to 2022		19.4%	21.8%	24.1%	24.4%	30.6%	28.2%	32.0%	37.8%	31.2%	23.5%	25.8%	26.0%			21.7%	27.7%	33.8%	25.1%	
% Change 2021 to 2022		295.9%	295.1%	302.8%	166.7%	58.0%	0.3%	-0.7%	-0.2%	-10.2%	-12.0%	-0.8%	-0.2%	30.8%	Annual Change	297.9%	48.6%	-3.6%	-4.5%	
Average Annual Change		1.8%	2.0%	2.2%	2.2%	2.8%	2.6%	2.9%	3.4%	2.8%	2.1%	2.3%	2.4%	2.5%		2.0%	2.5%	3.1%	2.3%	
2011	FTEs	1,076	989	996	1,108	1,133	1,133	1,158	1,214	1,074	972	929	1,071	1,071	Annual Change	1,020	1,125	1,149	991	
2012	FTEs	1,118	1,041	1,056	1,159	1,170	1,189	1,188	1,265	1,117	1,007	975	1,112	1,116		1,072	1,173	1,190	1,031	
2013	FTEs	1,142	1,093	1,120	1,159	1,194	1,181	1,218	1,296	1,116	1,012	1,006	1,153	1,141	2.2%	1,118	1,178	1,210	1,057	
2014	FTEs	1,132	1,061	1,095	1,180	1,223	1,214	1,254	1,346	1,182	1,031	1,003	1,149	1,156	1.3%	1,096	1,206	1,261	1,061	
2015	FTEs	1,136	1,071	1,076	1,155	1,208	1,218	1,260	1,367	1,154	1,011	992	1,131	1,148	-0.7%	1,094	1,193	1,260	1,045	
2016	FTEs	1,083	1,017	1,027	1,115	1,162	1,169	1,224	1,335	1,115	961	949	1,099	1,105	-3.8%	1,042	1,149	1,225	1,003	
2017	FTEs	1,103	1,017	1,014	1,150	1,218	1,196	1,266	1,371	1,166	979	957	1,119	1,130	2.3%	1,045	1,188	1,268	1,018	
2018	FTEs	1,197	1,125	1,111	1,238	1,319	1,295	1,351	1,472	1,236	1,075	1,053	1,218	1,224	8.3%	1,144	1,284	1,353	1,115	
2019	FTEs	1,195	1,119	1,110	1,251	1,338	1,305	1,372	1,483	1,239	1,075	1,059	1,210	1,230	0.5%	1,141	1,298	1,365	1,115	
2020	FTEs	1,394	1,186	848	238	306	281	865	1,264	1,198	917	356	438	774	-37.0%	1,143	275	1,109	570	
2021	FTEs	324	305	307	517	936	1,448	1,539	1,678	1,569	1,364	1,178	1,351	1,043	34.7%	312	967	1,595	1,298	
2022	FTEs	1,285	1,205	1,236	1,379	1,479	1,453	1,529	1,674	1,409	1,201	1,169	1,349	1,364	30.8%	1,242	1,437	1,537	1,239	
EMPLOYMENT														STAYING VISITOR						
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	FTEs	Employment (FTEs) and Share of Total (%)					
Staying Visitor	FTEs	1,462	1,522	1,579	1,597	1,607	1,560	1,603	1,712	1,721	1,016	1,441	1,846		2,000	80.0%	60.0%	40.0%	20.0%	0.0%
Total Employment	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754	Share of Total	1,500	1,500	1,500	1,500	1,500	1,500
Share of Total	%	64.4%	64.3%	63.2%	63.5%	61.9%	61.5%	61.5%	62.7%	62.6%	69.5%	64.6%	67.1%		1,000	60.0%	40.0%	20.0%	0.0%	0.0%
Annual Change in Share	%	-0.1%	-1.8%	0.6%	-2.6%	-0.6%	0.0%	1.9%	-0.2%	11.1%	-7.1%	3.8%								
Change in Share from 2011	%	-0.1%	-1.9%	-1.4%	-3.9%	-4.5%	-4.5%	-2.7%	-2.9%	7.9%	0.3%	4.1%								
Avg Ann. Change in Share	%	-0.1%	-1.0%	-0.5%	-1.0%	-0.9%	-0.8%	-0.4%	-0.4%	0.9%	0.0%	0.4%								

Staying Visitor FTEs

Share of Total

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022		DAY VISITOR		DIRECT EMPLOYMENT				
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		DAY VISITOR																	
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES											TOTAL	% Change					
Less than 3% change		Q1		Q2		Q3		Q4						Q1	Q2	Q3	Q4		
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			33.5%	11.1%	7.3%	4.5%
% Change 2011 to 2022		1.9%	14.0%	75.0%	-8.7%	15.1%	22.3%	0.6%	15.2%	1.3%	7.1%	-2.5%	8.1%	12.4%	Annual Change	107.0%	19.6%	-5.5%	0.0%
% Change 2021 to 2022		149.3%	105.3%	93.8%	59.8%	21.2%	2.9%	2.3%	-8.3%	-8.7%	-5.5%	4.6%	9.3%	14.8%					
Average Annual Change		0.2%	1.3%	6.8%	-0.8%	1.4%	2.0%	0.1%	1.4%	0.1%	0.6%	-0.2%	0.7%	1.1%		3.0%	1.0%	0.7%	0.4%
2011	FTEs	444	560	602	796	1,087	1,008	1,182	1,676	886	731	425	290	807		535	964	1,248	482
2012	FTEs	476	596	704	725	1,049	1,114	1,303	1,831	921	702	437	271	844	4.6%	592	963	1,352	470
2013	FTEs	480	648	798	756	1,296	1,121	1,425	2,074	945	740	465	302	921	9.1%	642	1,058	1,481	503
2014	FTEs	435	643	935	827	1,271	1,114	1,402	2,008	879	728	467	291	917	-0.5%	671	1,071	1,430	496
2015	FTEs	512	738	988	830	1,323	1,149	1,426	2,266	998	844	477	331	990	8.0%	746	1,101	1,563	551
2016	FTEs	511	721	1,071	798	1,361	1,259	1,317	2,210	917	778	445	324	976	-1.4%	768	1,139	1,481	516
2017	FTEs	525	742	1,102	821	1,401	1,295	1,354	2,272	941	798	456	333	1,003	2.8%	790	1,172	1,522	529
2018	FTEs	542	754	1,123	826	1,421	1,288	1,361	2,325	984	812	455	333	1,019	1.5%	806	1,179	1,557	533
2019	FTEs	564	799	1,185	834	1,411	1,339	1,326	2,285	1,010	830	444	337	1,030	1.2%	849	1,195	1,541	537
2020	FTEs	523	708	460	54	145	232	380	1,300	652	520	164	218	446	-56.7%	564	144	777	300
2021	FTEs	182	311	543	455	1,033	1,198	1,163	2,106	984	829	396	287	791	77.1%	345	895	1,418	504
2022	FTEs	453	639	1,053	727	1,252	1,233	1,189	1,931	898	783	414	314	907	14.8%	715	1,070	1,340	504
EMPLOYMENT													DAY VISITOR						
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Employment (FTEs) and Share of Total (%)					
Day Visitor	FTEs	807	844	921	917	990	976	1,003	1,019	1,030	446	791	907	FTEs					
Total Employment	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754						
Share of Total	%	35.6%	35.7%	36.8%	36.5%	38.1%	38.5%	38.5%	37.3%	37.4%	30.5%	35.4%	32.9%						
Annual Change in Share	%		0.2%	3.3%	-1.0%	4.6%	1.0%	0.0%	-3.1%	0.4%	-18.5%	16.1%	-7.0%						
Change in Share from 2011	%		0.2%	3.5%	2.5%	7.1%	8.2%	8.2%	4.9%	5.2%	-14.2%	-0.5%	-7.4%						
Avg Ann. Change in Share	%		0.2%	1.8%	0.8%	1.8%	1.6%	1.4%	0.7%	0.7%	-1.6%	0.0%	-0.7%						



STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL								2022		STAYING VISITORS		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
SERVICED ACCOMMODATION		2022		Change on 2021		Change on 2011		2022		STAYING VISITORS		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
2022		Est.	Beds	Est.	Beds	Est.	Beds	2022		STAYING VISITORS		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
Serviced Accommodation Total		155	2,915	-1	-9	+17	+343	SEASONAL AVAILABILITY OF BED SUPPLY		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
+50 Room		6	1,151	0	0	+1	+175	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
11-50 Room		13	748	0	0	-2	-6	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
<10 Room		136	1,016	-1	-9	+18	+174	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
NON-SERVICED ACCOMMODATION		2022		2022		Change on 2021		Change on 2011		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
2022		Est.	Beds	Est.	Beds	Est.	Beds	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
Non-Serviced Accommodation Total		99	3,150	-2	-15	+48	+1,137	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
Self catering		72	817	0	+24	+34	+414	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
Static caravans/chalets		0	446	0	0	0	+20	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
Touring caravans/camping		26	1,866	-2	-39	+14	+714	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
Youth Hostels		1	21	0	0	0	-11	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
DISTRIBUTION BY TYPE OF ACCOMMODATION		2022		2022		Change on 2021		Change on 2011		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
2022		Est.	Beds	Est.	Beds	Est.	Beds	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
All Paid Accommodation Total		254	6,065	-3	-24	+65	+1,480	2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
Serviced Accommodation Share of Total		61%	48%					2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
Non-Serviced Accommodation Share of Total		39%	52%					2022		2022		ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE	
SEASONAL AVAILABILITY OF BED SUPPLY		2022											
2022		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
All Paid Accommodation Total		4,837	5,312	5,777	5,826	5,829	5,830	6,065	6,065	5,830	5,784	5,528	5,341
Serviced Accommodation		2,911	2,911	2,911	2,911	2,914	2,915	2,915	2,915	2,915	2,914	2,915	2,913
Non-Serviced Accommodation		1,927	2,401	2,866	2,915	2,915	2,915	3,150	3,150	2,915	2,870	2,613	2,428

Report Sections With Historic Financial Data Indexed to 2022 Prices

Sections:
Comparative Headlines
Key Measures
Economic Impact
Sectoral Analysis

Visitor Types:
Total
Serviced Accommodation
Non-Serviced Accommodation
SFR
Staying Visitor
Day Visitor

Indexation: *Indexation to: 2022*

2011	1.39
2012	1.33
2013	1.29
2014	1.26
2015	1.24
2016	1.23
2017	1.20
2018	1.15
2019	1.12
2020	1.09
2021	1.08
2022	1.00

STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL

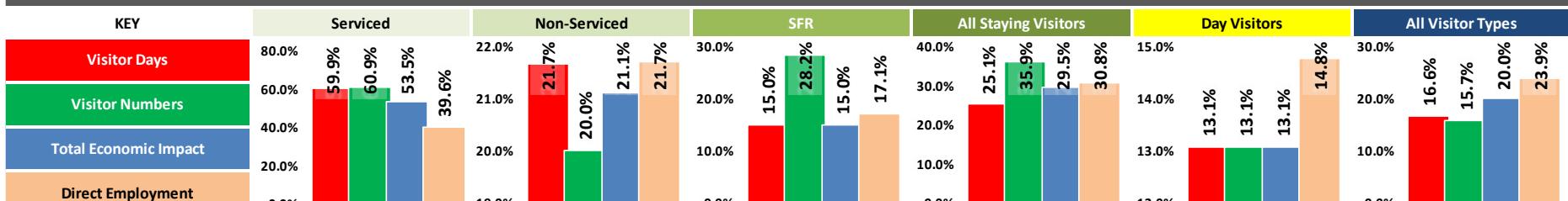
Comparing 2022 and 2021
2021 in 2022 prices (1.078)

COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2021 - INDEXED TO 2022

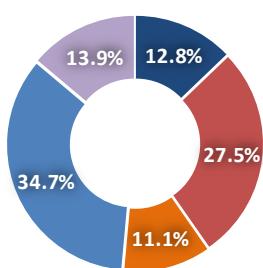
KEY		Staying in Paid Accommodation												Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types			
An increase of 3% or more		Serviced						Non-Serviced			SFR			All Staying Visitors			Day Visitors			All Visitor Types						
Less than 3% change		2022		2021		+/- %	2022		2021		+/- %	2022		2021		+/- %	2022		2021		+/- %	2022		2021		+/- %
A Fall of 3% or more		2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	
Visitor Days	M	0.268	0.168	59.9%	0.475	0.391	21.7%	0.508	0.442	15.0%	1.252	1.000	25.1%	2.722	2.408	13.1%	3.974	3.408	16.6%							
Visitor Numbers	M	0.141	0.088	60.9%	0.068	0.057	20.0%	0.214	0.167	28.2%	0.423	0.312	35.9%	2.722	2.408	13.1%	3.145	2.719	15.7%							
Direct Expenditure	£M																							163.77	136.24	20.2%
Economic Impact	£M	37.78	24.62	53.5%	32.21	26.59	21.1%	29.30	25.48	15.0%	99.29	76.70	29.5%	118.89	105.15	13.1%	218.18	181.85	20.0%							
Direct Employment	FTEs	805	576	39.6%	332	273	21.7%	227	194	17.1%	1,364	1,043	30.8%	907	791	14.8%	2,271	1,834	23.9%							
Total Employment	FTEs																							2,754	2,232	23.4%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2021 - INDEXED TO 2022



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2022

- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport



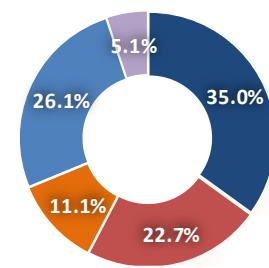
2022	2021	+/- %
21.00	15.21	38.1%
45.02	37.83	19.0%
18.24	15.31	19.1%
56.82	48.48	17.2%
22.70	19.42	16.9%
163.77	136.24	20.2%
54.40	45.61	19.3%
218.18	181.85	20.0%

TOTAL DIRECT

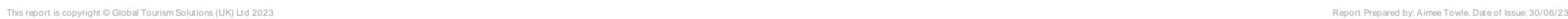
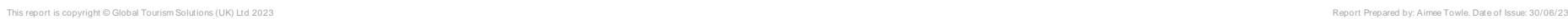
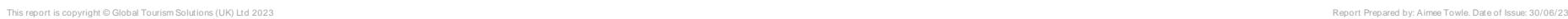
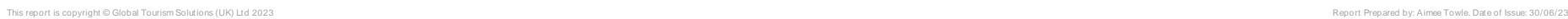
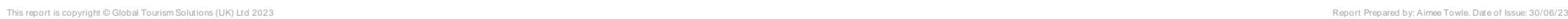
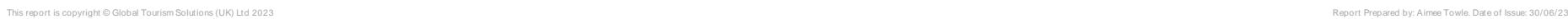
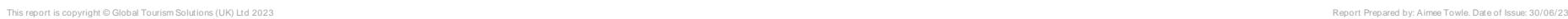
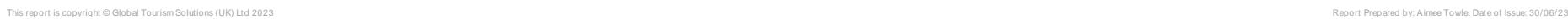
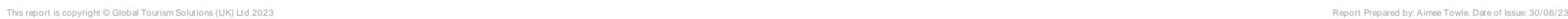
2022	2021	+/- %
794	603	31.6%
515	426	20.9%
253	209	21.1%
593	498	19.1%
116	98	18.8%
2,271	1,834	23.9%
483	398	21.2%
2,754	2,232	23.4%

TOTAL

- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

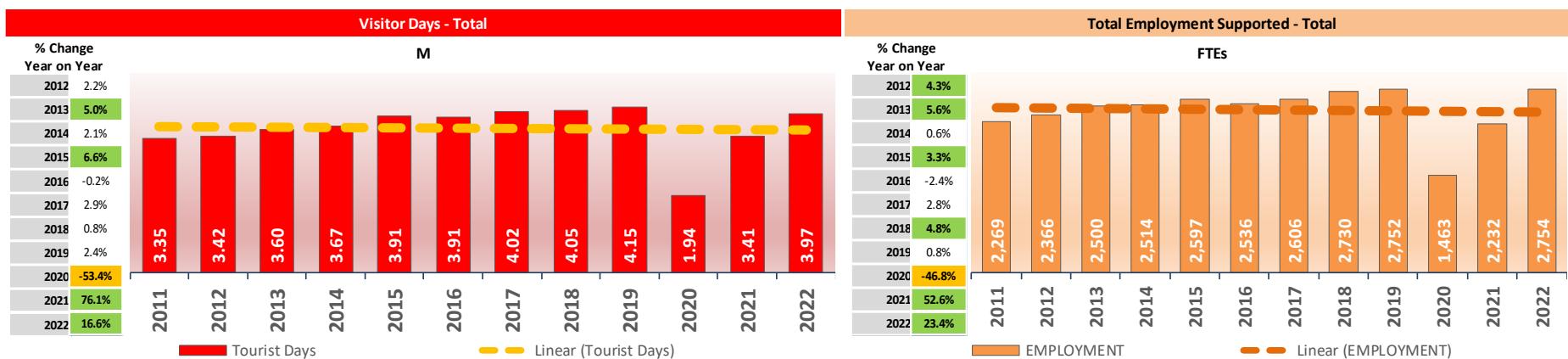
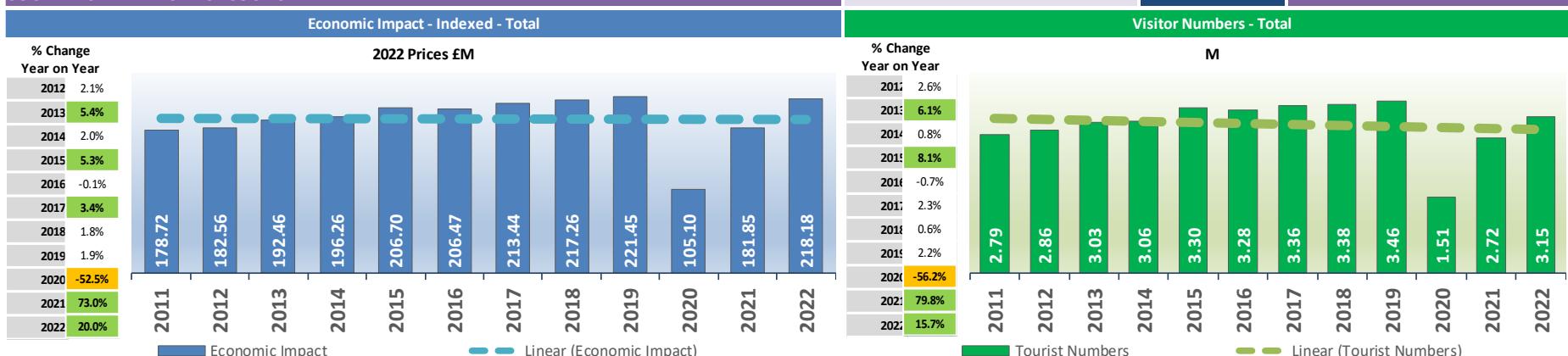


Sectoral Distribution of Employment - FTEs



STEAM REPORT FOR 2011-2022 - FINAL

SOUTH KESTEVEN DISTRICT COUNCIL

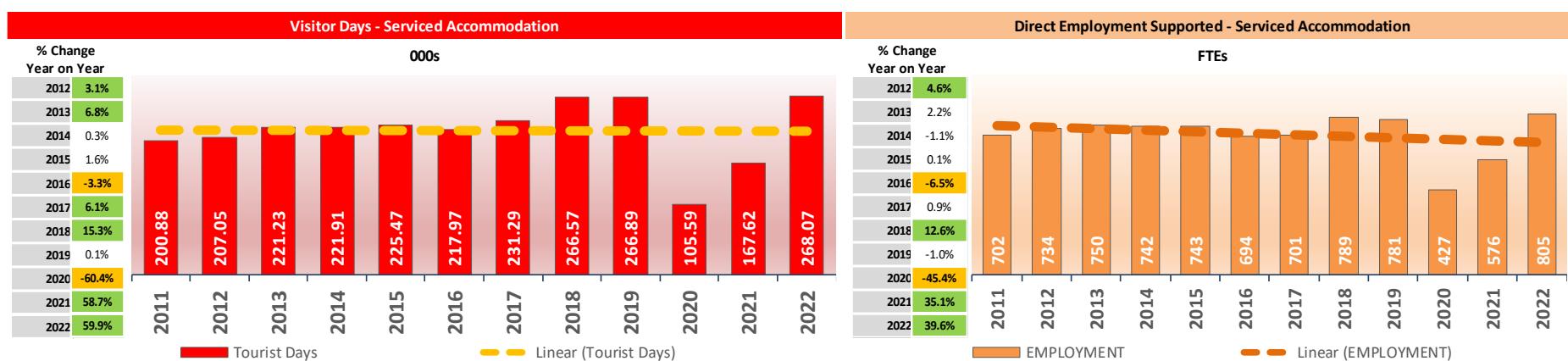


% Change from 2011	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Economic Impact - Indexed		2.1%	7.7%	9.8%	15.7%	15.5%	19.4%	21.6%	23.9%	-41.2%	1.8%	22.1%
Visitor Numbers		2.6%	8.8%	9.7%	18.6%	17.8%	20.6%	21.3%	24.0%	-45.7%	-2.4%	12.9%
Visitor Days		2.2%	7.3%	9.5%	16.8%	16.5%	20.0%	20.9%	23.8%	-42.3%	1.7%	18.6%
Total Employment	4.3%	10.2%	10.8%	14.5%	11.8%	14.9%	20.3%	21.3%	-35.5%	-1.6%	21.4%	

"Linear" = Linear Trendline

STEAM REPORT FOR 2011-2022 - FINAL

SOUTH KESTEVEN DISTRICT COUNCIL

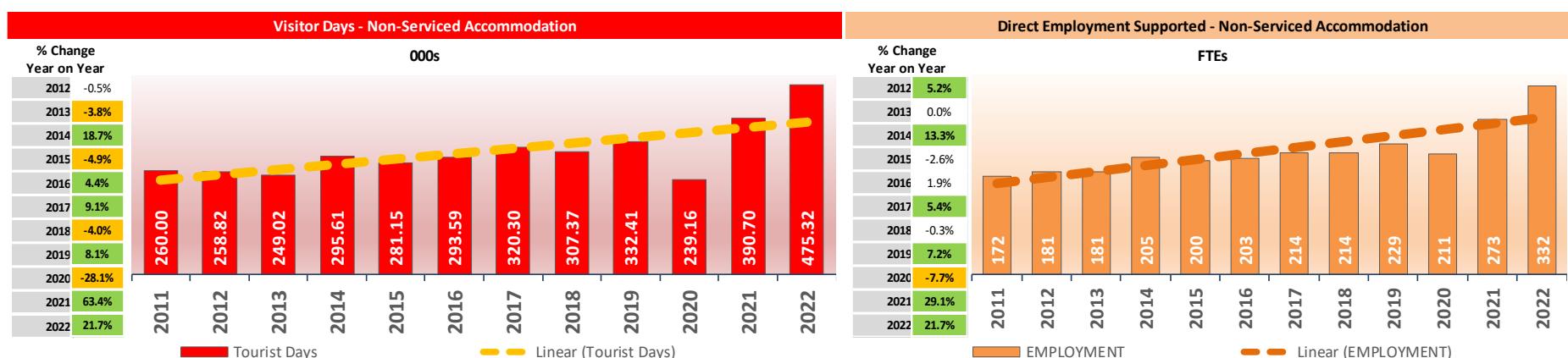


% Change from 2011	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Economic Impact - Indexed		2.9%	13.5%	12.3%	13.3%	10.8%	17.2%	31.1%	29.8%	-49.3%	-18.1%	25.7%
Visitor Numbers		3.8%	14.0%	8.6%	6.7%	1.9%	7.4%	23.8%	23.9%	-49.0%	-22.4%	24.9%
Visitor Days		3.1%	10.1%	10.5%	12.2%	8.5%	15.1%	32.7%	32.9%	-47.4%	-16.6%	33.4%
Direct Employment		4.6%	6.9%	5.7%	5.8%	-1.1%	-0.2%	12.4%	11.2%	-39.2%	-17.9%	14.6%

"Linear" = Linear Trendline

STEAM REPORT FOR 2011-2022 - FINAL

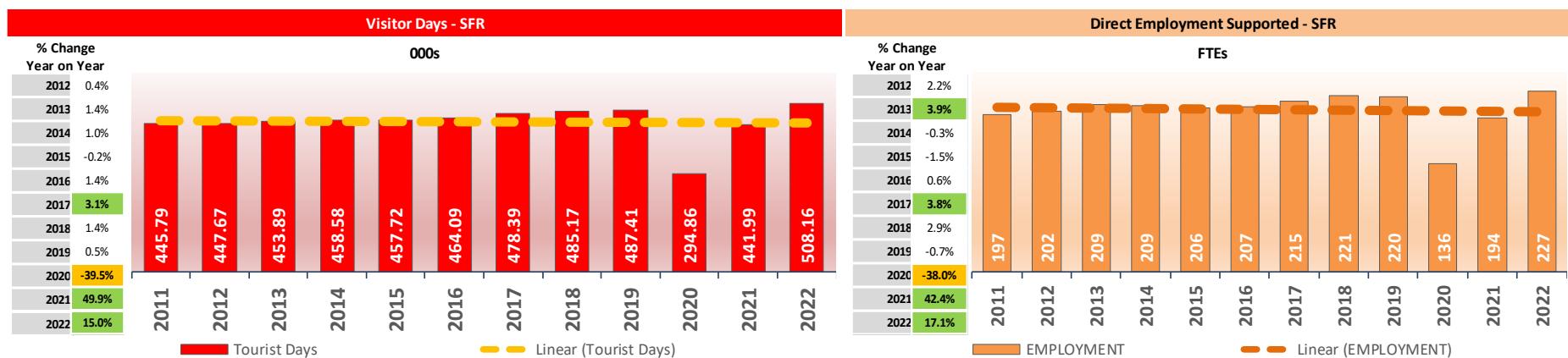
SOUTH KESTEVEN DISTRICT COUNCIL



% Change from 2011	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Economic Impact - Indexed		-0.3%	-4.5%	13.5%	8.0%	14.0%	24.0%	18.7%	27.3%	0.6%	64.4%	99.1%
Visitor Numbers		-0.2%	-2.9%	10.6%	5.2%	3.5%	12.9%	8.4%	17.1%	-14.0%	40.0%	68.0%
Visitor Days		-0.5%	-4.2%	13.7%	8.1%	12.9%	23.2%	18.2%	27.9%	-8.0%	50.3%	82.8%
Direct Employment		5.2%	5.2%	19.2%	16.1%	18.3%	24.7%	24.4%	33.3%	23.0%	58.8%	93.3%

"Linear" = Linear Trendline

STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL

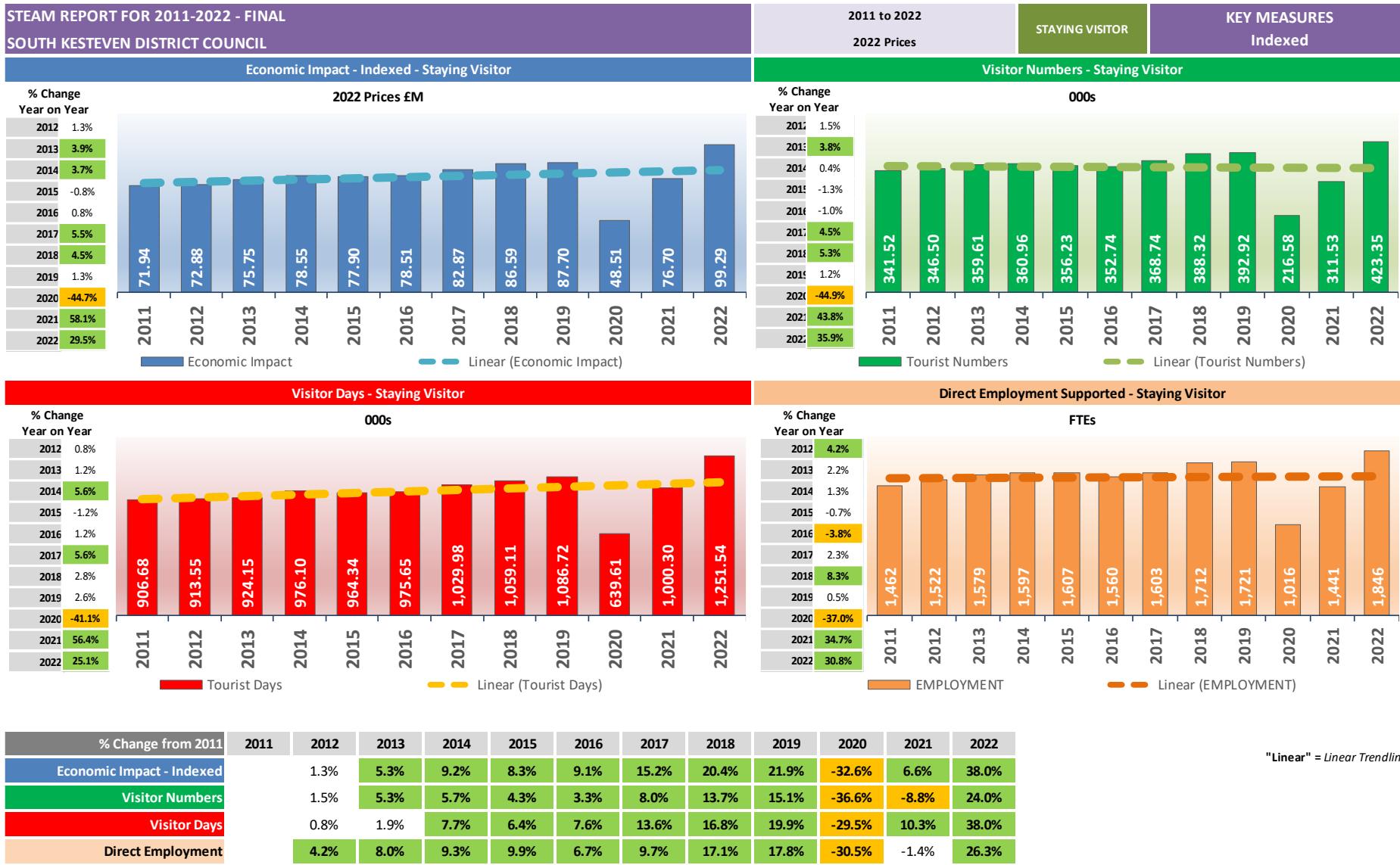


% Change from 2011	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Economic Impact - Indexed	0.4%	1.8%	2.9%	2.7%	4.1%	7.3%	8.8%	9.3%	-33.9%	-0.9%	14.0%	
Visitor Numbers	0.4%	1.9%	2.9%	2.7%	4.1%	7.3%	8.8%	9.3%	-34.0%	-11.2%	13.9%	
Visitor Days	0.4%	1.8%	2.9%	2.7%	4.1%	7.3%	8.8%	9.3%	-33.9%	-0.9%	14.0%	
Direct Employment	2.2%	6.2%	5.9%	4.4%	5.0%	9.0%	12.2%	11.4%	-31.0%	-1.7%	15.0%	

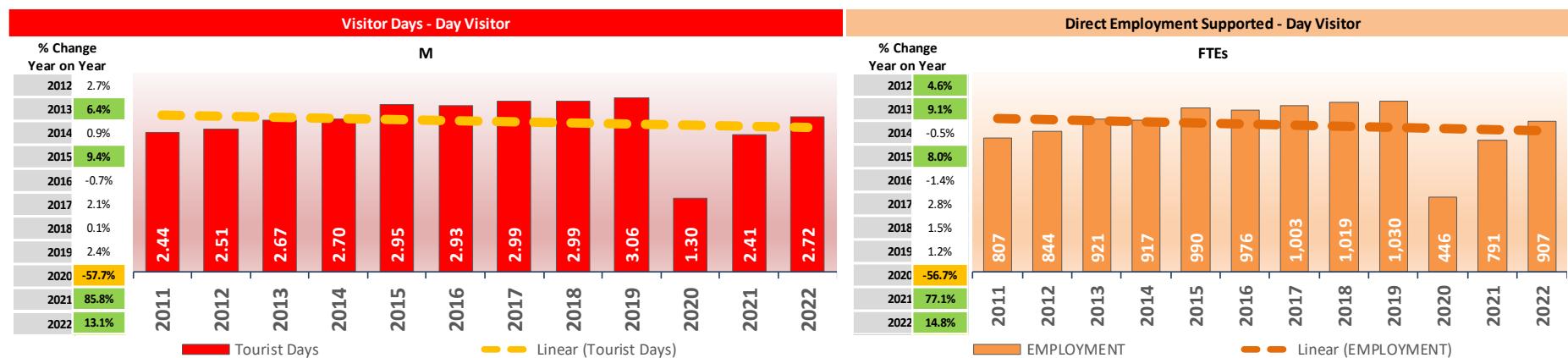
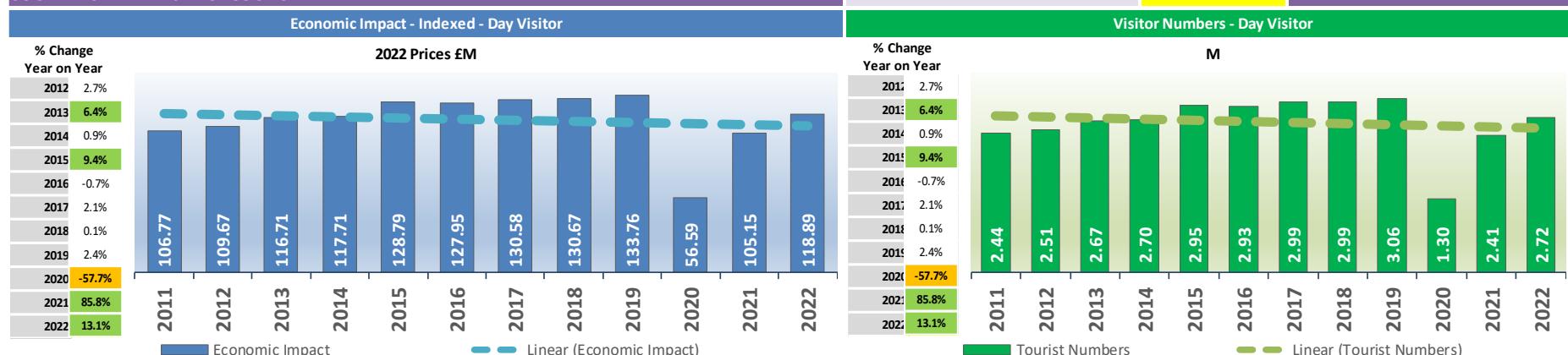
"Linear" = Linear Trendline

STEAM REPORT FOR 2011-2022 - FINAL

SOUTH KESTEVEN DISTRICT COUNCIL



STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL



% Change from 2011	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Economic Impact - Indexed		2.7%	9.3%	10.2%	20.6%	19.8%	22.3%	22.4%	25.3%	-47.0%	-1.5%	11.3%
Visitor Numbers		2.7%	9.3%	10.2%	20.6%	19.8%	22.3%	22.4%	25.3%	-47.0%	-1.5%	11.4%
Visitor Days		2.7%	9.3%	10.2%	20.6%	19.8%	22.3%	22.4%	25.3%	-47.0%	-1.5%	11.4%
Direct Employment	4.6%	14.1%	13.5%	22.6%	20.9%	24.3%	26.2%	27.6%	-44.7%	-2.1%		12.4%

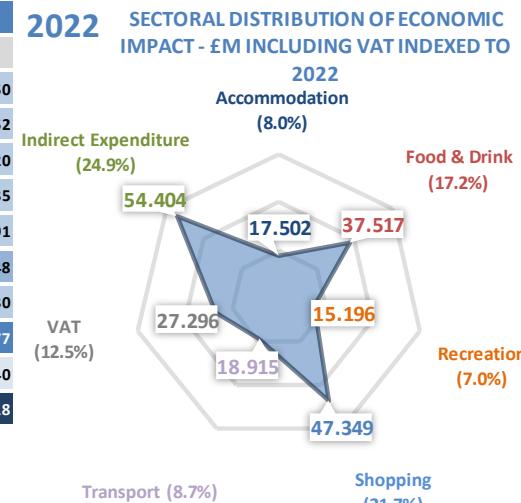
"Linear" = Linear Trendline

STEAM REPORT FOR 2011-2022 - FINAL
SOUTH KESTEVEN DISTRICT COUNCIL

2011 to 2022
2022 Prices

TOTAL
SECTORAL ANALYSIS
Indexed

SECTORAL DISTRIBUTION OF ECONOMIC IMPACT - £M INCLUDING VAT INDEXED TO 2022													
SECTOR / YEAR	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	
Accommodation	£M	12.39	12.70	14.00	14.02	13.87	13.98	14.81	15.84	15.61	8.258	12.73	17.50
Food & Drink	£M	31.04	31.68	33.17	33.91	35.76	35.66	36.83	37.49	38.32	19.27	31.65	37.52
Recreation	£M	12.53	12.79	13.42	13.75	14.54	14.49	14.97	15.24	15.60	7.738	12.80	15.20
Shopping	£M	40.23	41.11	43.22	44.03	47.04	46.91	48.26	48.71	49.85	23.04	40.56	47.35
Transport	£M	15.74	16.04	16.78	17.23	18.26	18.26	18.83	18.94	19.43	9.340	16.25	18.91
Direct Revenue	£M	111.92	114.32	120.59	122.93	129.47	129.30	133.70	136.23	138.81	67.64	113.98	136.48
VAT	£M	22.38	22.86	24.12	24.59	25.89	25.86	26.74	27.25	27.76	11.14	22.26	27.30
Direct Expenditure	£M	134.30	137.19	144.71	147.52	155.36	155.15	160.44	163.47	166.57	78.78	136.24	163.77
Indirect Expenditure	£M	44.42	45.37	47.76	48.74	51.33	51.31	53.01	53.79	54.89	26.32	45.61	54.40
TOTAL	£M	178.72	182.56	192.46	196.26	206.70	206.47	213.44	217.26	221.45	105.10	181.85	218.18



SECTORAL DISTRIBUTION OF EMPLOYMENT - FTES

SECTOR / YEAR	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	
Accommodation	FTEs	655	688	694	693	693	651	648	716	716	477	603	794
Food & Drink	FTEs	422	439	471	475	495	489	509	526	531	266	426	515
Recreation	FTEs	207	215	231	234	244	241	251	259	262	130	209	253
Shopping	FTEs	499	519	559	563	593	587	608	623	630	290	498	593
Transport	FTEs	96	99	106	108	113	112	116	119	120	58	98	116
Direct Employment	FTEs	1,878	1,960	2,062	2,073	2,138	2,081	2,133	2,243	2,260	1,221	1,834	2,271
Indirect Employment	FTEs	390	406	438	441	459	455	473	488	492	242	398	483
TOTAL	FTEs	2,269	2,366	2,500	2,514	2,597	2,536	2,606	2,730	2,752	1,463	2,232	2,754



STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL												2011 to 2022 2022 Prices		TOTAL		ECONOMIC IMPACT Indexed													
ECONOMIC IMPACT BY:		MONTH AND QUARTER												CALENDAR YEAR		QUARTER													
KEY		TOTAL																											
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2022 / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER													
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2		Q3		Q4							
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Annual Change		26.8%		21.4%		21.6%		19.0%					
% Change 2011 to 2022		9.9%	15.5%	52.5%	7.8%	25.7%	28.1%	17.3%	26.4%	18.9%	16.6%	15.6%	25.7%	22.1%		210.7%		29.5%		-7.0%		-4.2%							
% Change 2021 to 2022		303.1%	214.6%	169.5%	113.8%	30.0%	1.4%	-0.4%	-8.2%	-12.3%	-11.5%	-0.2%	3.2%	20.0%		2.4%		1.9%		2.0%		1.7%							
Average Annual Change		0.9%	1.4%	4.8%	0.7%	2.3%	2.6%	1.6%	2.4%	1.7%	1.5%	1.4%	2.3%	2.0%		34.27		51.28		62.64		30.53							
2011 £M		10.44	11.81	12.02	14.77	18.54	17.97	20.39	26.65	15.60	12.65	9.003	8.874	178.72		35.87		50.93		65.63		30.13							
2012 £M		10.56	12.16	13.16	13.95	17.83	19.15	21.39	28.28	15.96	12.21	9.271	8.646	182.56		2.1%		39.19		53.08		68.50		31.69					
2013 £M		10.67	13.47	15.05	13.96	20.41	18.72	22.37	30.34	15.80	12.40	9.892	9.401	192.46		5.4%		42.22		56.40		74.95		33.13					
2014 £M		10.26	13.06	16.30	15.16	20.71	19.21	22.85	30.57	16.23	12.69	9.908	9.308	196.26		2.0%		39.62		55.09		69.65		31.91					
2015 £M		11.27	14.24	16.70	15.04	21.36	20.01	23.49	34.16	17.30	13.87	9.816	9.437	206.70		5.3%		42.83		58.03		73.30		32.31					
2016 £M		11.17	14.00	17.66	14.87	21.90	21.26	22.67	34.04	16.58	13.13	9.547	9.628	206.47		-0.1%		43.37		60.69		75.97		33.41					
2017 £M		11.59	14.09	17.68	15.60	23.12	21.97	23.50	34.97	17.50	13.60	9.794	10.02	213.44		1.8%		44.66		61.22		77.05		34.34					
2018 £M		11.98	14.63	18.05	15.67	23.49	22.05	23.62	35.69	17.74	13.95	10.05	10.34	217.26		1.9%		46.34		62.79		77.58		34.74					
2019 £M		12.33	15.15	18.86	16.05	23.83	22.91	23.72	35.69	18.18	14.29	10.11	10.34	221.45		1.9%		36.21		65.42		46.00		16.35					
2020 £M		13.63	14.48	8.106	1.064	2.276	3.202	9.174	22.59	14.24	9.657	2.442	4.255	105.10		-52.5%		181.85		73.0%		13.99		48.09		81.86		37.92	
2021 £M		2.848	4.337	6.802	7.449	17.93	22.71	24.01	36.69	21.15	16.67	10.43	10.81	218.18		20.0%		43.45		62.26		76.15		36.32					
2022 £M		11.48	13.64	18.33	15.92	23.30	23.03	23.92	33.68	18.55	14.76	10.41	11.16	218.18		2.4%		1.9%		2.0%		1.7%		34.34		37.92			
ECONOMIC IMPACT - INDEXED TO 2022														TOTAL						Economic Impact by Year and Share of Total									
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	£M															
Total		178.72	182.56	192.46	196.26	206.70	206.47	213.44	217.26	221.45	105.10	181.85	218.18	250.00					120.0%										
All Visitor Types		178.72	182.56	192.46	196.26	206.70	206.47	213.44	217.26	221.45	105.10	181.85	218.18	200.00					100.0%										
Share of Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	200.00					80.0%										
Annual Change in Share																		60.0%											
Change in Share from 2011																		40.0%											
Avg Ann. Change in Share																		20.0%											



STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022 2022 Prices		SERVICED ACCOMMODATION		ECONOMIC IMPACT Indexed							
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER							
KEY		SERVICED ACCOMMODATION																				
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2022 / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER						
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2	Q3	Q4		
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			11.9%	40.6%	29.2%	25.0%			
% Change 2011 to 2022		5.6%	13.2%	13.4%	37.9%	48.6%	36.2%	29.7%	33.6%	22.8%	24.2%	21.8%	29.6%	25.7%		393.9%	101.4%	1.2%	4.4%			
% Change 2021 to 2022		348.6%	435.2%	373.8%	372.7%	252.5%	17.8%	9.8%	-3.8%	-1.3%	-2.1%	3.3%	12.9%	53.5%	Annual Change	1.1%	3.7%	2.7%	2.3%			
Average Annual Change		0.5%	1.2%	1.2%	3.4%	4.4%	3.3%	2.7%	3.1%	2.1%	2.2%	2.0%	2.7%	2.3%			8.846	6.752	7.403	7.064		
2011	£M	1.674	3.866	3.305	1.742	2.161	2.849	2.525	2.714	2.164	2.209	2.650	2.206	30.06	2.9%	8.861	7.147	7.758	7.186			
2012	£M	1.539	3.939	3.382	1.822	2.200	3.124	2.480	2.925	2.352	2.200	2.823	2.162	30.95		10.86	7.608	7.696	7.977			
2013	£M	1.680	4.804	4.373	1.812	2.490	3.306	2.534	2.893	2.269	2.189	3.225	2.562	34.14	10.3%	10.14	7.867	8.409	7.631			
2014	£M	1.652	4.367	4.018	1.983	2.474	3.077	2.650	2.863	2.692	2.393	3.076	2.506	33.75	-1.1%	10.04	7.533	8.205	7.975			
2015	£M	1.822	4.476	3.845	1.915	2.492	3.460	2.715	3.173	2.520	2.474	2.847	2.310	34.05	0.9%	9.779	7.683	8.314	7.546			
2016	£M	1.676	4.323	3.780	1.946	2.415	3.322	2.753	3.163	2.399	2.302	2.816	2.428	33.32	-2.1%	9.560	8.813	8.834	8.027			
2017	£M	1.833	4.167	3.560	2.262	2.975	3.577	2.885	3.273	2.676	2.503	2.917	2.607	35.23	5.7%	10.57	9.834	10.04	8.974			
2018	£M	2.051	4.657	3.866	2.441	3.386	4.008	3.304	3.879	2.853	2.812	3.252	2.909	39.42	11.9%	10.44	9.778	9.890	8.905			
2019	£M	2.032	4.573	3.838	2.410	3.368	3.999	3.291	3.808	2.790	2.826	3.276	2.803	39.02	-1.0%	8.342	0.876	3.982	2.030			
2020	£M	2.149	4.548	1.645	0.198	0.332	0.345	0.772	1.856	1.354	1.270	0.432	0.327	15.23	-61.0%	8.342	0.876	3.982	2.030			
2021	£M	0.394	0.818	0.791	0.508	0.911	3.295	2.983	3.769	2.693	2.802	3.122	2.533	24.62	61.7%	2.003	4.714	9.445	8.457			
2022	£M	1.769	4.377	3.749	2.402	3.211	3.881	3.276	3.627	2.659	2.744	3.226	2.859	37.78	53.5%	9.895	9.494	9.562	8.830			
ECONOMIC IMPACT - INDEXED TO 2022														SERVICED ACCOMMODATION								
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Economic Impact by Year and Share of Total								
Serviced	£M	30.06	30.95	34.14	33.75	34.05	33.32	35.23	39.42	39.02	15.23	24.62	37.78	£M								
All Visitor Types	£M	178.72	182.56	192.46	196.26	206.70	206.47	213.44	217.26	221.45	105.10	181.85	218.18	Share of Total %								
Share of Total	%	16.8%	17.0%	17.7%	17.2%	16.5%	16.1%	16.5%	18.1%	17.6%	14.5%	13.5%	17.3%									
Annual Change in Share	%	0.8%	4.6%	-3.1%	-4.2%	-2.0%	2.3%	9.9%	-2.9%	-17.8%	-6.6%	27.9%										
Change in Share from 2011	%	0.8%	5.4%	2.2%	-2.1%	-4.1%	-1.9%	7.9%	4.7%	-13.9%	-19.5%	2.9%										
Avg Ann. Change in Share	%	0.8%	2.7%	0.7%	-0.5%	-0.8%	-0.3%	1.1%	0.6%	-1.5%	-2.0%	0.3%										

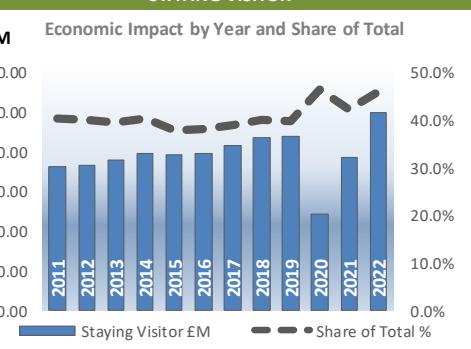
STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022 2022 Prices		NON-SERVICED ACCOMMODATION		ECONOMIC IMPACT Indexed										
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER										
KEY		NON-SERVICED ACCOMMODATION											CALENDAR YEAR												
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2022 / PERCENTAGE CHANGES											TOTAL												
Less than 3% change		Q1			Q2			Q3			Q4			% Change		Q1		Q2		Q3		Q4			
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Annual Change		146.2%		70.2%		102.5%		144.1%	
% Change 2011 to 2022		189.5%	130.7%	135.9%	78.1%	74.4%	62.0%	101.7%	106.7%	98.1%	89.6%	165.4%	276.0%	99.1%			4272.6%		34.9%		-0.9%		4.4%		
% Change 2021 to 2022		4164.2%	3934.6%	4568.3%	257.0%	30.3%	2.3%	4.4%	2.2%	-9.6%	-12.8%	6.2%	45.8%	21.1%			13.3%		6.4%		9.3%		13.1%		
Average Annual Change		17.2%	11.9%	12.4%	7.1%	6.8%	5.6%	9.2%	9.7%	8.9%	8.1%	15.0%	25.1%	9.0%			1.259		5.757		7.327		1.831		
2011	£M	0.278	0.368	0.613	1.201	2.248	2.308	2.325	2.816	2.186	0.992	0.511	0.328	16.17			1.259		5.757		7.327		1.831		
2012	£M	0.303	0.376	0.663	1.203	2.142	2.243	2.278	2.852	2.144	1.008	0.536	0.373	16.12	-0.3%		1.342		5.587		7.274		1.916		
2013	£M	0.301	0.358	0.675	1.106	2.085	1.870	2.239	2.831	2.070	0.988	0.542	0.373	15.44	-4.2%		1.334		5.061		7.140		1.904		
2014	£M	0.317	0.379	0.738	1.241	2.458	2.484	2.592	3.449	2.587	1.081	0.621	0.408	18.35	18.9%		1.434		6.183		8.628		2.110		
2015	£M	0.261	0.383	0.630	1.047	2.314	2.324	2.676	3.573	2.409	0.830	0.626	0.390	17.46	-4.9%		1.273		5.685		8.657		1.846		
2016	£M	0.286	0.406	0.647	1.081	2.372	2.394	2.836	3.833	2.571	0.899	0.679	0.430	18.43	5.6%		1.338		5.847		9.240		2.007		
2017	£M	0.313	0.472	0.648	1.194	2.602	2.515	3.140	4.067	2.944	0.968	0.710	0.480	20.05	8.8%		1.433		6.311		10.15		2.158		
2018	£M	0.298	0.456	0.620	1.137	2.537	2.419	2.967	3.955	2.715	0.965	0.688	0.444	19.20	-4.2%		1.374		6.092		9.638		2.097		
2019	£M	0.343	0.482	0.650	1.318	2.788	2.563	3.245	4.140	2.809	0.981	0.771	0.489	20.58	7.2%		1.476		6.669		10.19		2.241		
2020	£M	0.748	0.704	0.607	0.068	0.186	0.192	2.673	4.620	4.227	1.624	0.135	0.494	16.28	-20.9%		2.059		0.446		11.52		2.253		
2021	£M	0.019	0.021	0.031	0.599	3.010	3.654	4.494	5.697	4.790	2.158	1.276	0.845	26.59	63.4%		0.071		7.262		14.98		4.279		
2022	£M	0.804	0.850	1.447	2.139	3.921	3.739	4.690	5.820	4.329	1.882	1.355	1.232	32.21	21.1%		3.100		9.799		14.84		4.469		
ECONOMIC IMPACT - INDEXED TO 2022														NON-SERVICED ACCOMMODATION											
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	£M	Economic Impact by Year and Share of Total										
Non-Serviced	£M	16.17	16.12	15.44	18.35	17.46	18.43	20.05	19.20	20.58	16.28	26.59	32.21	35.00	20.0%										
All Visitor Types	£M	178.72	182.56	192.46	196.26	206.70	206.47	213.44	217.26	221.45	105.10	181.85	218.18	30.00	15.0%										
Share of Total	%	9.0%	8.8%	8.0%	9.4%	8.4%	8.9%	9.4%	8.8%	9.3%	15.5%	14.6%	14.8%	25.00	10.0%										
Annual Change in Share	%			-2.4%	-9.2%	16.6%	-9.7%	5.7%	5.2%	-5.9%	5.2%	66.6%	-5.6%	0.9%	20.00	5.0%									
Change in Share from 2011	%				-2.4%	-11.4%	3.3%	-6.7%	-1.4%	3.8%	-2.3%	2.7%	71.1%	61.6%	63.1%	15.00	0.0%								
Avg Ann. Change in Share	%					-2.4%	-5.7%	1.1%	-1.7%	-0.3%	0.6%	-0.3%	0.3%	7.9%	6.2%	5.7%	10.00	2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022							

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022 2022 Prices		SFR		ECONOMIC IMPACT Indexed										
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER										
KEY		SFR																							
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2022 / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER									
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2		Q3		Q4			
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			8.8%		14.2%		18.4%		14.4%			
% Change 2011 to 2022		10.2%	3.1%	10.9%	12.9%	16.4%	13.8%	17.6%	18.7%	19.0%	13.2%	12.2%	15.8%	14.0%		676.3%		27.4%		-21.7%		-21.9%			
% Change 2021 to 2022		684.2%	647.4%	684.1%	170.3%	-0.2%	-19.4%	-17.1%	-16.6%	-35.0%	-36.5%	-19.8%	-14.1%	15.0%		Annual Change		0.8%		1.3%		1.7%		1.3%	
Average Annual Change		0.9%	0.3%	1.0%	1.2%	1.5%	1.3%	1.6%	1.7%	1.7%	1.2%	1.1%	1.4%	1.3%		6.463		6.908		6.645		5.690			
2011	£M	3.596	1.397	1.469	3.052	2.146	1.710	2.518	2.646	1.481	1.393	1.156	3.141	25.71		6.439		6.928		6.687		5.759			
2012	£M	3.567	1.384	1.488	3.078	2.132	1.718	2.517	2.677	1.492	1.402	1.181	3.175	25.81		6.666		6.897		6.728		5.882			
2013	£M	3.619	1.473	1.575	3.048	2.149	1.701	2.545	2.704	1.479	1.397	1.213	3.272	26.17		6.606		7.004		6.927		5.906			
2014	£M	3.635	1.433	1.538	3.095	2.185	1.725	2.600	2.779	1.548	1.420	1.210	3.277	26.44		6.533		7.066		7.052		5.742			
2015	£M	3.631	1.383	1.519	3.084	2.214	1.768	2.649	2.848	1.555	1.415	1.176	3.151	26.39		6.556		7.159		7.194		5.850			
2016	£M	3.635	1.390	1.532	3.127	2.243	1.790	2.697	2.908	1.589	1.428	1.195	3.227	26.76		6.683		7.433		7.452		6.010			
2017	£M	3.752	1.405	1.526	3.240	2.352	1.841	2.794	2.986	1.673	1.469	1.220	3.322	27.58		6.854		7.496		7.454		6.169			
2018	£M	3.842	1.456	1.556	3.264	2.376	1.856	2.795	3.007	1.652	1.500	1.248	3.421	27.97		6.852		7.578		7.503		6.166			
2019	£M	3.853	1.445	1.554	3.306	2.407	1.865	2.832	3.020	1.651	1.499	1.259	3.408	28.10		7.447		0.535		6.272		2.748			
2020	£M	5.050	1.540	0.857	0.208	0.182	0.145	1.693	2.666	1.913	1.384	0.180	1.183	17.00		-39.5%		7.421		0.906		6.194		10.05	
2021	£M	0.505	0.193	0.208	1.275	2.504	2.415	3.571	3.769	2.710	2.483	1.618	4.234	25.48		7.033		7.890		7.865		8.334			
2022	£M	3.963	1.441	1.630	3.446	2.498	1.946	2.961	3.142	1.763	1.577	1.297	3.638	29.30		7.000		20.0%		15.0%		0.0%			
ECONOMIC IMPACT - INDEXED TO 2022														SFR						Economic Impact by Year and Share of Total					
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	£M											
SFR		25.71	25.81	26.17	26.44	26.39	26.76	27.58	27.97	28.10	17.00	25.48	29.30												
All Visitor Types		178.72	182.56	192.46	196.26	206.70	206.47	213.44	217.26	221.45	105.10	181.85	218.18												
Share of Total		14.4%	14.1%	13.6%	13.5%	12.8%	13.0%	12.9%	12.9%	12.7%	16.2%	14.0%	13.4%												
Annual Change in Share		%	-1.7%	-3.8%	-0.9%	-5.2%	1.5%	-0.3%	-0.4%	-1.5%	27.5%	-13.4%	-4.2%												
Change in Share from 2011		%	-1.7%	-5.5%	-6.3%	-11.2%	-9.9%	-10.2%	-10.5%	-11.8%	12.5%	-2.6%	-6.6%												
Avg Ann. Change in Share		%	-1.7%	-2.7%	-2.1%	-2.8%	-2.0%	-1.7%	-1.5%	-1.5%	1.4%	-0.3%	-0.6%												

Report Prepared by: Aimee Towle. Date of Issue: 30/06/23

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STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022 2022 Prices		STAYING VISITOR		ECONOMIC IMPACT Indexed					
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		STAYING VISITOR																		
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2022 / PERCENTAGE CHANGES											TOTAL	% Change	QUARTER					
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2	Q3	Q4
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Annual Change	20.9%	20.9%	40.0%	51.0%	35.8%	
% Change 2011 to 2022		17.8%	18.4%	26.7%	33.2%	46.9%	39.3%	48.3%	54.0%	50.1%	35.0%	36.2%	36.2%			572.0%	49.6%	-6.4%	-6.0%	
% Change 2021 to 2022		611.5%	546.3%	562.6%	235.3%	49.9%	2.2%	-1.1%	-4.9%	-14.1%	-16.7%	-2.3%	1.5%	29.5%	1.9%	3.6%	4.6%	3.3%	3.3%	
Average Annual Change		1.6%	1.7%	2.4%	3.0%	4.3%	3.6%	4.4%	4.9%	4.6%	3.2%	3.3%	3.3%	3.5%		1.9%	3.6%	4.6%	3.3%	3.3%
2011	£M	5.549	5.632	5.387	5.995	6.554	6.867	7.368	8.176	5.831	4.594	4.317	5.674	71.94	1.3%	16.57	19.42	21.37	14.59	
2012	£M	5.410	5.700	5.533	6.103	6.474	7.086	7.275	8.455	5.988	4.610	4.540	5.710	72.88		16.64	19.66	21.72	14.86	
2013	£M	5.600	6.635	6.623	5.966	6.724	6.876	7.318	8.429	5.817	4.575	4.980	6.207	75.75	3.9%	18.86	19.57	21.56	15.76	
2014	£M	5.604	6.179	6.295	6.319	7.116	7.285	7.841	9.091	6.828	4.894	4.907	6.190	78.55	3.7%	18.08	20.72	23.76	15.99	
2015	£M	5.714	6.242	5.994	6.046	7.020	7.552	8.039	9.594	6.485	4.719	4.649	5.851	77.90	-0.8%	17.95	20.62	24.12	15.22	
2016	£M	5.597	6.118	5.959	6.154	7.029	7.507	8.285	9.903	6.559	4.628	4.690	6.085	78.51	0.8%	17.67	20.69	24.75	15.40	
2017	£M	5.898	6.044	5.733	6.697	7.929	7.932	8.818	10.33	7.293	4.940	4.847	6.408	82.87	5.5%	17.68	22.56	26.44	16.20	
2018	£M	6.192	6.568	6.042	6.841	8.299	8.283	9.066	10.84	7.221	5.277	5.188	6.775	86.59	4.5%	18.80	23.42	27.13	17.24	
2019	£M	6.228	6.501	6.042	7.035	8.564	8.427	9.369	10.97	7.250	5.305	5.307	6.700	87.70	1.3%	18.77	24.03	27.59	17.31	
2020	£M	7.947	6.792	3.110	0.474	0.700	0.682	5.138	9.142	7.494	4.279	0.748	2.004	48.51	-44.7%	17.85	1.857	21.77	7.031	
2021	£M	0.918	1.032	1.030	2.382	6.424	9.364	11.05	13.23	10.19	7.442	6.017	7.612	76.70	58.1%	2.980	18.17	34.48	21.07	
2022	£M	6.535	6.667	6.826	7.987	9.630	9.566	10.93	12.59	8.751	6.202	5.879	7.729	99.29	29.5%	20.03	27.18	32.27	19.81	
ECONOMIC IMPACT - INDEXED TO 2022														STAYING VISITOR						
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	£M Economic Impact by Year and Share of Total						
Staying Visitor	£M	71.94	72.88	75.75	78.55	77.90	78.51	82.87	86.59	87.70	48.51	76.70	99.29							
All Visitor Types	£M	178.72	182.56	192.46	196.26	206.70	206.47	213.44	217.26	221.45	105.10	181.85	218.18							
Share of Total	%	40.3%	39.9%	39.4%	40.0%	37.7%	38.0%	38.8%	39.9%	39.6%	46.2%	42.2%	45.5%							
Annual Change in Share	%		-0.8%	-1.4%	1.7%	-5.8%	0.9%	2.1%	2.7%	-0.6%	16.6%	-8.6%	7.9%							
Change in Share from 2011	%		-0.8%	-2.2%	-0.6%	-6.4%	-5.5%	-3.6%	-1.0%	-1.6%	14.7%	4.8%	13.0%							
Avg Ann. Change in Share	%		-0.8%	-1.1%	-0.2%	-1.6%	-1.1%	-0.6%	-0.1%	-0.2%	1.6%	0.5%	1.2%							



Report Prepared by: Aimee Towle. Date of Issue: 30/06/23

STEAM REPORT FOR 2011-2022 - FINAL SOUTH KESTEVEN DISTRICT COUNCIL											2011 to 2022 2022 Prices		DAY VISITOR		ECONOMIC IMPACT Indexed							
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER							
KEY		DAY VISITOR																				
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2022 / PERCENTAGE CHANGES												TOTAL	% Change	QUARTER						
Less than 3% change		Q1			Q2			Q3			Q4					Q1		Q2	Q3	Q4		
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Annual Change		32.3%		10.1%	6.4%	3.5%
% Change 2011 to 2022		1.0%	12.9%	73.4%	-9.5%	14.1%	21.2%	-0.3%	14.2%	0.4%	6.1%	-3.4%	7.2%	11.3%		112.8%		17.2%	-7.4%	-2.0%		
% Change 2021 to 2022		156.3%	111.0%	99.3%	56.6%	18.8%	0.9%	0.2%	-10.1%	-10.6%	-7.3%	2.6%	7.1%	13.1%								
Average Annual Change		0.1%	1.2%	6.7%	-0.9%	1.3%	1.9%	0.0%	1.3%	0.0%	0.6%	-0.3%	0.7%	1.0%		2.9%		0.9%		0.6%		
2011	£M	4.895	6.177	6.633	8.770	11.98	11.11	13.02	18.47	9.768	8.059	4.686	3.200	106.77		17.70		31.86	41.26	15.95		
2012	£M	5.152	6.457	7.624	7.848	11.36	12.06	14.11	19.83	9.970	7.599	4.731	2.936	109.67		2.7%	19.23		31.26	43.91	15.27	
2013	£M	5.070	6.840	8.424	7.989	13.69	11.84	15.05	21.91	9.984	7.821	4.912	3.194	116.71			6.4%		20.33	33.51	46.94	15.93
2014	£M	4.657	6.879	10.00	8.845	13.60	11.93	15.01	21.48	9.404	7.796	5.001	3.118	117.71			0.9%		21.54	34.37	45.89	15.91
2015	£M	5.555	8.002	10.71	8.994	14.34	12.46	15.45	24.56	10.82	9.153	5.167	3.586	128.79			9.4%		24.27	35.79	50.83	17.91
2016	£M	5.577	7.881	11.70	8.714	14.87	13.75	14.39	24.14	10.02	8.504	4.858	3.543	127.95			-0.7%		25.16	37.34	48.55	16.90
2017	£M	5.694	8.048	11.95	8.901	15.19	14.04	14.69	24.64	10.21	8.659	4.947	3.607	130.58			2.1%		25.69	38.14	49.53	17.21
2018	£M	5.789	8.062	12.01	8.830	15.19	13.77	14.55	24.85	10.52	8.675	4.861	3.561	130.67			0.1%		25.86	37.79	49.92	17.10
2019	£M	6.101	8.646	12.82	9.020	15.27	14.48	14.35	24.72	10.93	8.983	4.800	3.645	133.76			2.4%		27.57	38.77	50.00	17.43
2020	£M	5.679	7.685	4.996	0.590	1.576	2.520	4.037	13.45	6.741	5.378	1.694	2.250	56.59			-57.7%		18.36	4.685	24.23	9.323
2021	£M	1.929	3.305	5.772	5.067	11.51	13.35	12.96	23.46	10.96	9.231	4.414	3.201	105.15			85.8%		11.01	29.92	47.38	16.85
2022	£M	4.945	6.975	11.50	7.937	13.67	13.46	12.99	21.09	9.804	8.553	4.527	3.429	118.89			13.1%		23.42	35.07	43.89	16.51
ECONOMIC IMPACT - INDEXED TO 2022														DAY VISITOR								
SHARE OF MARKET		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Economic Impact by Year and Share of Total								
Day Visitor	£M	106.77	109.67	116.71	117.71	128.79	127.95	130.58	130.67	133.76	56.59	105.15	118.89	£M								
All Visitor Types	£M	178.72	182.56	192.46	196.26	206.70	206.47	213.44	217.26	221.45	105.10	181.85	218.18	Economic Impact by Year and Share of Total								
Share of Total	%	59.7%	60.1%	60.6%	60.0%	62.3%	62.0%	61.2%	60.1%	60.4%	53.8%	57.8%	54.5%	£M								
Annual Change in Share	%		0.6%	0.9%	-1.1%	3.9%	-0.5%	-1.3%	-1.7%	0.4%	-10.9%	7.4%	-5.8%	£M								
Change in Share from 2011	%		0.6%	1.5%	0.4%	4.3%	3.7%	2.4%	0.7%	1.1%	-9.9%	-3.2%	-8.8%	£M								
Avg Ann. Change in Share	%		0.6%	0.8%	0.1%	1.1%	0.7%	0.4%	0.1%	0.1%	-1.1%	-0.3%	-0.8%	£M								



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Appendix C: Summary of the key points from the longer STEAM Visitor Data for 2022

Background

There are two main tourism models used in the UK: Cambridge and STEAM. The STEAM model produced by Global Tourism Solutions and is the preferred method for assessing the visitor economy of authorities across Greater Lincolnshire and the East Midlands. STEAM 2022 reports are available for East Lindsey, West Lindsey, Boston, Rutland, and Greater Lincolnshire (Lincolnshire plus Rutland). These reports have been used to situate South Kesteven's performance in the regional context and to highlight shared trends. North Kesteven and City of Lincoln have commissioned STEAM reports for 2022. These reports are awaiting approval for publication (September 2023) and will be added to the analysis once available. South Holland did not commission a STEAM report. STEAM data is available for the period 2011-2022. In this briefing, the financial data throughout is in 2022 prices to enable a more accurate comparison with the pre-pandemic period (pages 45-59 of STEAM report).

Key Messages

There are four overarching trends contained in the 2022 reports. These trends are largely replicated across Greater Lincolnshire and are:

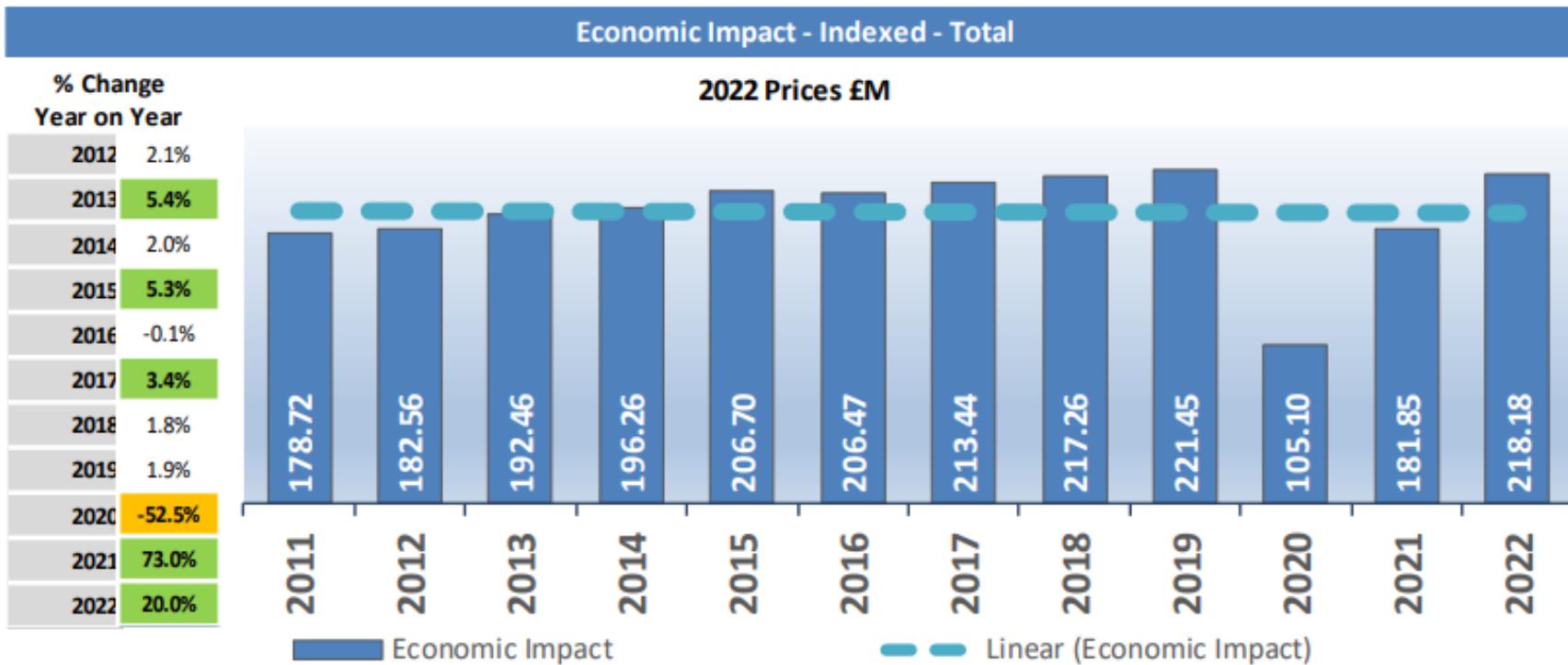
- The visitor economy is resilient. Following the pandemic nadir, the visitor economy has bounced back to, but has yet to exceed pre-pandemic (2019) levels. South Kesteven has seen the second strongest recovery in Greater Lincolnshire, behind East Lindsey.
- Overall visitor numbers are down. For South Kesteven, excluding the pandemic period of 2020 & 2021, total visitors are at the lowest level since 2014, down 9% on 2019. This trend is observed across Greater Lincolnshire. South Kesteven had the second lowest fall in visitors, again behind East Lindsey. For Greater Lincolnshire the overall fall was 13.04%. The visitor drop is concentrated amongst Day visitors, who compose the vast majority of visitors in each authority (86.55% in South Kesteven). Falls in day visitors range from 11.13% in South Kesteven to 21.98% in Rutland. Greater Lincolnshire 15.33%.
- Visitors are spending more. Overall Visitor spending is up 8.27% on 2019 in South Kesteven, a trend mirrored across Greater Lincolnshire. The average visitor spend per visitor in South Kesteven was £69.37, the second lowest in Greater Lincolnshire. Spending habits vary significantly depending on length of stay and choice of accommodation. The growth in visitor spending is being driven by staying visitors. Day spending has remained essentially static. Visitors choosing non-serviced accommodation are the most valuable economically. Such visitors in South Kesteven spent an average of £471.60 over the duration of their stay, up 9.08%. South Kesteven had the second highest spenders of visitors in this category, behind Rutland (£521.95).

- Staying visitors have increased. Whilst overall numbers are down, visitors seeking accommodation are up 7.76% in South Kesteven. In terms of staying visitor numbers and economic impact, 2022 was a record-breaking year for South Kesteven (2011-2022). This upwards trend was observed in all available comparator areas bar Rutland (1.38% decline). South Kesteven has seen extraordinary growth in the number of visitors choosing non-serviced accommodation, up 43% on 2019 (Greater Lincolnshire 6.52%).

Total visitors are down, yet more visitors are choosing to stay overnight, for longer durations and are spending more than ever before.

Key Stats for South Kesteven

- A total of £218.18 million was generated within the local economy through visitor and tourism business expenditure. The sector is 98.52% of its pre-pandemic size (2019 adjusted to 2022 prices). This is the second strongest recovery in Lincolnshire (**Figure 1**).
- South Kesteven received 3.15 million visitors during 2022, a decline of 9% on 2019. Overall visitor spending is up 8.27% on 2019.
- A total of 2,754 full time equivalent (FTE) roles are supported by the sector.
- 86.55% of visitors were day-trippers (2,722,000 people). Day visitor numbers are down 11.13% on 2019. Day trippers are responsible for 54% of the total visitor economy, generating £118.89 million with an average visitor spend of £43.68. Average visitor spend has essentially not changed since 2019 (0.02% increase).
- 13.45% of visitors stay overnight (423,400 people). Staying visitor numbers are up 7.76% on 2019. Staying visitors are responsible for 46% of the total visitor economy, generating £99.280 million with an average visitor spend of £234.51, up 5.06% on 2019.
- The spending and visitor habits of staying visitors vary depending on accommodation choice. Visitors choosing non-serviced accommodation represent 2% of all visitors yet contribute 14.76% of the visitor economy. These are the most economically valuable visitors with an average spend per visit of £471.60, up 9.08% from 2019. 68,300 visitors chose to stay in non-serviced accommodation in 2022, a 43.49% increase on 2019.



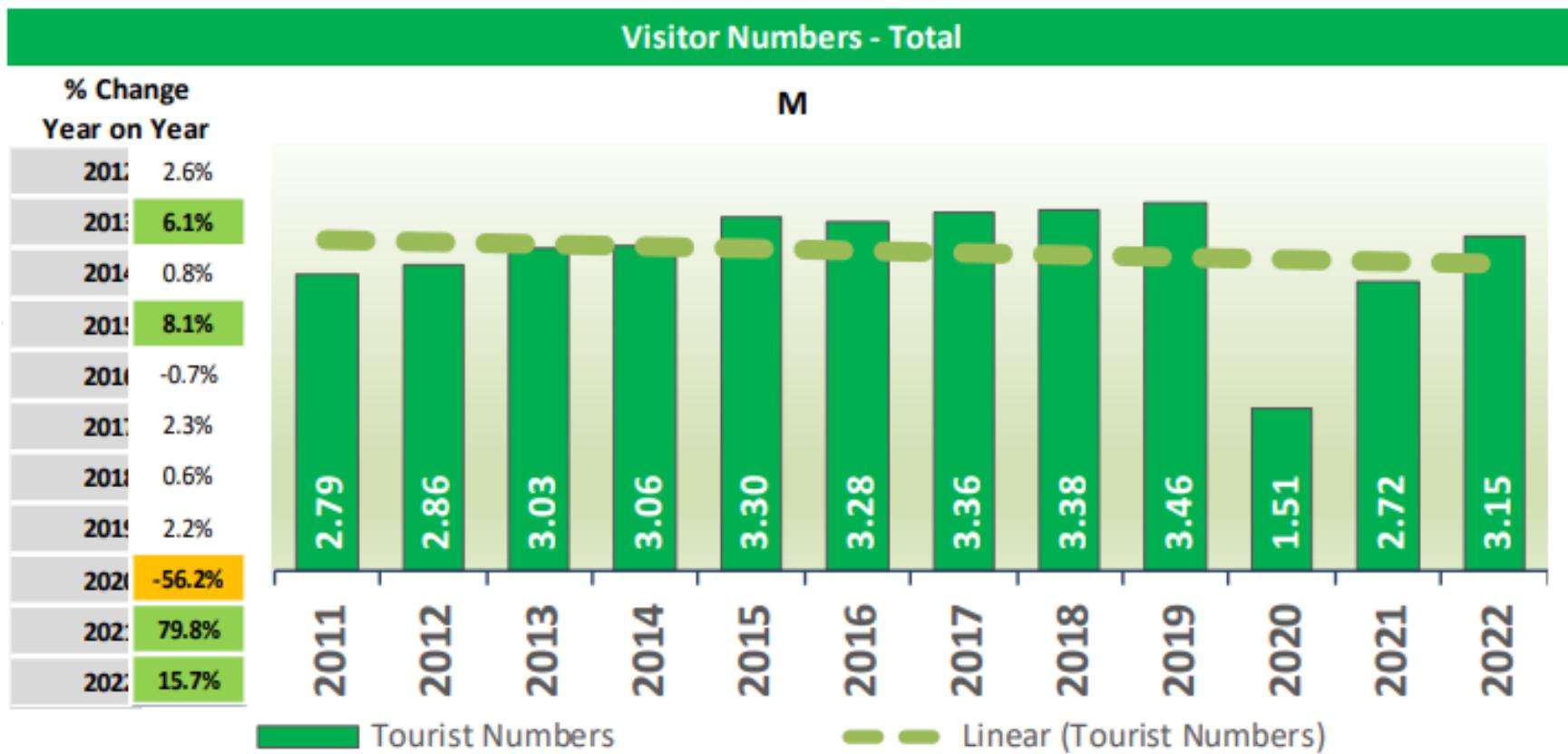


Figure 2 - Visitor Numbers - South Kesteven 2011-2022, Source: STEAM Report 2022 page 47

South Kesteven: The Visitor Economy

A total of £218.18 million was generated within the local economy through visitor and tourism business expenditure. Economic impact consists of four main elements: Direct expenditure (the combination of direct revenue and VAT) and Indirect Expenditure (other spending). The overall recovery of the visitor economy in South Kesteven has been impressive and faster than that of Greater Lincolnshire as a whole. The visitor economy is 1.48% smaller than it was in 2019 (prices adjusted for inflation) compared to 6.39% for Greater Lincolnshire.

The performance of each component sub-sector is summarised in **Table 1**. The performance of each sub-sector for South Kesteven versus other areas in Greater Lincolnshire is summarised in **Table 2**. Broadly, the resilience exhibited by South Kesteven's visitor economy is largely replicated across Greater Lincolnshire. South Kesteven's recovery is the second strongest of the compared areas, behind only East Lindsey. Note that the visitor economy is significantly larger in East Lindsey (worth approximately £824.2 million). All authorities have seen a trend of smaller visitor numbers compared to 2019, but more staying visitors and an increased visitor spend to compensate.

Table 1: STEAM Data 2022 – Economic Impact Summary, South Kesteven vs Greater Lincolnshire							
Total Economic Impact: Direct Expenditure + Indirect Expenditure. Direct Expenditure: Total Direct Revenue + VAT. On Sector size compared to pre-pandemic (2019) 100 = 2019.							
Spending Category	Economic Impact 2022 (£ millions)	Sector size compared to pre-pandemic (2019)	Sector size compared to pre-pandemic - Greater Lincolnshire	Share of Total Direct Revenue (South Kesteven)	Share of Total Direct Revenue (Greater Lincolnshire)	Supported jobs (FTE)	Sectoral distribution of employment %
Accommodation	17.50	112.15	100	12.82%	14.50%	794	28.83%
Food & Drink	37.52	97.89	93.53	27.49%	27.24%	515	18.70%
Recreation	15.20	97.41	92.82	11.13%	10.55%	253	9.19%
Shopping	47.35	94.98	91.71	34.69%	34.02%	593	21.53%
Transport	18.91	97.35	93.19	13.86%	13.75%	116	4.21%
Total Direct Revenue	136.48	98.32	93.65	N/A	N/A	N/A	N/A
VAT	27.30	N/A	N/A	N/A	N/A	N/A	N/A
Direct Expenditure	163.77	98.32	93.68	N/A	N/A	2271	82.46%
Indirect Expenditure	54.40	99.12	93.41	N/A	N/A	483	17.54%
Total Economic Impact	218.18	98.52	93.61	N/A	N/A	2754	100%

The process of recovery varies by sub-sector:

Accommodation

The sector is a clear success story. Fuelled by an increase in staying guests, the sector generated £17.50 million in 2022 and is 12.15% larger than it was pre-pandemic – the only sector to have achieved this feat. 2022 was a record year for sector, generating 12.82% of total direct revenue and supporting 794 FTE roles – the most of any sector. Note the growth in this sector is being driven by non-serviced, not serviced accommodation.

Food and Drink

The recovery of this sector is advanced. In 2022, the sector generated £37.52 million and is 97.89% of its pre-pandemic size. Spending on food & drink produced 27.49% of total direct revenue and supported 515 FTE roles.

Recreation

This sector has also recovered strongly. In 2022, the sector generated £15.29 million and is 97.41% of its pre-pandemic size. Recreational spending produced 11.13% of total direct revenue and supported 253 FTE roles.

Shopping

The success of this sector is critical for the district's visitor economy, contributing 34.69% of total direct revenue. Recovery has lagged behind the other sectors being 94.98% of its pre-pandemic size. In 2022, the sector generated £47.35 million and supported 593 FTE roles.

Transport

The recovery of this sector is again advanced. In 2022, the sector generated £18.91 million and is 97.35% of its pre-pandemic size. Transport produced 13.75% of total direct revenue and supported 116 FTE roles.

South Kesteven: Overall visitor trends and habits

In 2022 there were an estimated 3.15 million tourism visits to South Kesteven. 87% of visitors were in the district for the day. 13% or an estimated 423,350 stayed in the District for at least one night.

Total visitor numbers are up 15.7% or 430,000 on 2021. However, visitor numbers are down -8.95% on 2019, when there were 3.46 million visitors to the district. Excluding the pandemic period of 2020 & 2021, total visitors are at the lowest level since 2014.

The decline is observed amongst day visitors, whose 2022 level is -11.11% lower than 2019. As with overall spend, these trends are observed across Greater Lincolnshire. The decline in visitor numbers post pandemic is not actually as severe in South Kesteven compared to other localities. The drop is 9% in South Kesteven, in Rutland 18.95% and 13.04% for Greater Lincolnshire as a whole. Trends in Visitor numbers and spending by market segment across Greater Lincolnshire are detailed in **Table 3**.

Significant differences are observed in the spending and visitation habits depending on the choice or not, of accommodation. The findings for each visitor and accommodation type are detailed in **Table 4**.

Day Visitors

For further detail and historic analysis consult the STEAM Report sections - Visitor Numbers: page 29, Visitor Days: page 36, Employment: page 43, Economic Impact: page 59.

Most visitors to the District (87%) are day-trippers. 2.722 million people visited the district in 2022, this is a 13.1% increase on 2021 (total day visitors 2.408 million), but still 11.13% down on the 2019 peak of 3.063 million. Excluding the pandemic period, day visitors were at the lowest level since 2014. Day visitors contributed £118.89 million to the local economy, 54% of the total visitor economy. This is due to the shorter visit duration and an average visitor spend of £43.68, which is exactly in line with the other authorities of Greater Lincolnshire. Overall economic impact is down 11.12% on 2019, with the day-visitor economy 88.88% of its pre-pandemic size, the most advanced recovery in Greater Lincolnshire. Average consumer spending has increased extremely slightly at 0.02% on 2019. Day-trippers will most often visit the district in the summer months. The total for August (483,000) is greater than that of Q4 (378,000). Annually 907 FTE jobs are supported, down 11.94% on 2019. Following seasonal demand, total roles peak at 1931 in August, before slumping back to 314 for December.

Staying Visitors

For further detail and historic analysis consult the STEAM Report sections - Visitor Numbers: page 28, Visitor Days: page 35, Employment: page 42, Economic Impact: page 58.

Visitors who choose to stay in the district for at least one night can be sorted into three broad categories depending on choice of accommodation: Staying with Friends or Relatives (SFR), Serviced Accommodation and Non-serviced Accommodation. Visitor habits: month of visit, duration, spending etc differ significantly between the categories. Considering the staying visitors as a whole, 13% of total visitors chose to stay overnight in 2022. This is 423,400 people, a 35.9% increase on 2021 and a 7.76% increase on 2019. 2022 was the district's best year (2011-2022) in terms of staying visitor numbers. There was a total of 1,251,500 visitor days, equalling an average duration of stay of 2.95 days, a slight increase on the 2019 average of 2.76. £99.29 million was generated by staying visitors, a 13.22% increase on 2019 with an average visitor spend of £234.51, a 5.06% increase on 2019. 1364 FTE roles are supported, up 10.89% on 2019. During the seasonal peak of August, this figure rises to 1674 FTE.

Staying with Friends or Relatives (SFR)

For further detail and historic analysis consult the STEAM Report sections - Visitor Numbers: page 27, Visitor Days: page 34, Employment: page 41, Economic Impact: page 57.

If staying overnight, then the most popular form of accommodation was staying with friends or relatives (SFR). This was the preferred choice of 214,150 visitors: 7% of total visitors and 51% of staying visitors. There was a total of 508,200 visitor days, thus the average duration of stay was 2.37 days. £29.3 million was contributed to the local economy with an average Visitor spend of £136.85, the lowest spend of any category of staying visitor. A trend observed in the comparator areas. Visitor numbers, days and economic impact have all increased post pandemic, surpassing 2019 levels. Visitor numbers are 4.18% higher than 2019, whilst the market segment in terms of economic impact is 4.27% larger. Consumer spending has remained basically static, growing by 10 pence or 0.08%. Visitation patterns closely track the school year with peaks in the Christmas, Easter and Summer holidays. Q2 is the best performing with 136,800 visitors, closely followed by Q3 (136,400). The highest visitor months are January (68,700 visitors) and December (63,100), a logical time to visit friends and family over the holiday season. The next highest is April (59,800), which is also when average spending rises to a high of £155.16. The traditional holiday month of August trails at 54,500 visitors. The market segment supports 227 FTE roles annually, rising to the mid-300s during the peak winter months.

Serviced Accommodation

For further detail and historic analysis consult the STEAM Report sections - Visitor Numbers: page 25, Visitor Days: page 32, Employment: page 39, Economic Impact: page 55.

Serviced accommodation is the second most popular choice for stayers with 140,880 visitors 2022: 4% of total visitors and 33% stayers. There was a total of 268,100 visitor days, thus the average duration of stay was 1.91 days. £37.78 million was contributed to the local economy with an average Visitor spend of £268.13. Average spending is down 3.93% on 2019, with the market segment nearly recovering to pre-pandemic levels (3.18% smaller). Overall visitor numbers have remained steady, growing very slightly on 2019 at 0.79%. South Kesteven is an outlier in this regard with other areas witnessing a fall in total visitors: -4.92% Greater Lincolnshire, and -7.75% East Lindsey & Rutland. Again Q1 & 4 are the most popular periods for visitors, with the most popular month being February.

Non-serviced Accommodation

For further detail and historic analysis consult the STEAM Report sections - Visitor Numbers: page 26, Visitor Days: page 33, Employment: page 40, Economic Impact: page 56.

A small minority of visitors prefer to use non-serviced accommodation. This market segment is the most economically valuable and has also seen remarkable growth post-pandemic. In 2022, 68,300 visitors chose this form: 2% total and 16% stayers.

Usage is up 43% on 2019, when non-serviced accommodation was the choice of 1.37% of total visitors and 12% of stayers. Similar, although significantly lower growth occurred in North Kesteven (20%), across the rest of Greater Lincolnshire growth has been slower (6.52%).

As overall visitor numbers remain down, the segments growth has come via cutting into the share of other accommodation choices. There was a total of 475,300 visitor days, thus the average duration of stay was 6.96 days. £32.21 million was contributed to the local economy with an average Visitor spend of £471.60. Average spending is up 9.08% on 2019, and the market segment is 56.51% larger. The segment's economic importance is highlighted by making up 14.76% of the district's visitor economy and 32.44% of the contribution of staying visitors. With the average stay significantly higher than the other types of accommodation, it is to be expected that the average spend would be likewise. Crucially the average day spend for this segment of £67.77 is higher than the day spend of SFR and Day Visitors.

The average visitor spend is the second highest in Greater Lincolnshire behind Rutland. Examining the market in the comparator areas reveals, despite the impressive growth, the segment remains small compared to peers, suggesting the current growth is catch up and there is further potential. For Greater Lincolnshire as a whole, non-serviced was used by 6% of visitors, in East Lindsey: 28%. The best point of comparison is to Rutland given the findings of *2020 Greater Lincolnshire Airbnb* study by Lincolnshire County Council, which emphasised the importance of the southern area around Stamford to the local Airbnb market.¹ In Rutland, the market is 4% of total visitors. Q3 is the best performing for visitor numbers, with August and September being the most popular months.

¹ Greater Lincolnshire Airbnb study, May 2020, Lincolnshire County Council, p 18, Greater_Lincolnshire_Airbnb_study_Final.pdf (visitlincolnshire.com)

Table 2: STEAM Data Economic Impact Summary 2022 by Sector: South Kesteven vs Lincolnshire Comparators (Greater Lincolnshire: Lincolnshire & Rutland)										
Table combines and summarises page 53 of each available STEAM report for the district authorities in Lincolnshire, plus Rutland and Greater Lincolnshire. Total Economic Impact: Direct Expenditure + Indirect Expenditure. Direct Expenditure: Total Direct Revenue + VAT. On Sector size compared to pre-pandemic (2019) 100 = 2019.										
Spending Category	Indicators	South Kesteven	West Lindsey	East Lindsey	North Kesteven	South Holland	City of Lincoln	Boston	Rutland	Greater Lincolnshire
Total Economic Impact	Economic Impact 2022 (£ millions)	218.18	145.66	824.20	Awaiting internal sign off	N/A	Awaiting internal sign off	95.13	149.51	2621.00
	Economic Impact 2019 (£ millions)	221.45	159.97	823.39	TBC	N/A	TBC	103.08	159.39	2800.00
	Year on year growth 2021-2022	20%	21%	21%	TBC	N/A	TBC	24%	32%	20%
	Sector size compared to pre-pandemic (2019)	98.52	91.05	100.10	TBC	N/A	TBC	92.29	93.80	93.61
	Total Employment (FTE)	2754	1662	8918	TBC	N/A	TBC	1044	1574	28215
	Direct Expenditure	163.77	108.42	609.79	TBC	N/A	TBC	71.34	112.59	1912.00
	VAT	27.30	18.07	101.63	TBC	N/A	TBC	11.89	18.77	319.00
Indirect Expenditure	Economic Impact 2022 (£ millions)	54.40	37.24	214.41	TBC	N/A	TBC	23.79	36.92	709.00
	Economic Impact 2019 (£ millions)	54.89	40.96	213.36	TBC	N/A	TBC	25.83	39.36	759.00
	Sector size compared to pre-pandemic (2019)	99.12	90.92	100.49	TBC	N/A	TBC	92.10	93.80	93.41
Total Direct Revenue (excluding VAT)	Economic Impact 2022 (£ millions)	136.48	90.35	508.16	TBC	N/A	TBC	59.45	93.83	1593.00
	Economic Impact 2019 (£ millions)	138.81	99.18	508.36	TBC	N/A	TBC	64.38	100.03	1701.00
	Sector size compared to pre-pandemic (2019)	98.32	91.10	99.96	TBC	N/A	TBC	92.34	93.80	93.65
Accommodation	Economic Impact 2022 (£ millions)	17.50	6.64	112.50	TBC	N/A	TBC	5.61	25.85	231.00
	Economic Impact 2019 (£ millions)	15.61	6.92	112.58	TBC	N/A	TBC	5.75	22.50	231.00
	Share of total Direct Revenue	12.82%	7.35%	22.14%	TBC	N/A	TBC	9.43%	27.55%	14.50%
	Sector size compared to pre-pandemic (2019)	112.15	95.93	99.93	TBC	N/A	TBC	97.48	114.89	100.00
	Total Employment (FTE)	794	299	2097	TBC	N/A	TBC	166	397	5040
Food & Drink	Economic Impact 2022 (£ millions)	37.52	25.67	135.95	TBC	N/A	TBC	17.00	22.46	434.00
	Economic Impact 2019 (£ millions)	38.32	28.04	135.37	TBC	N/A	TBC	18.32	25.21	464.00
	Share of total Direct Revenue	27.49%	28.41%	26.75%	TBC	N/A	TBC	28.60%	23.94%	27.24%
	Sector size compared to pre-pandemic (2019)	97.89	91.55	100.43	TBC	N/A	TBC	92.79	89.09	93.53
	Total Employment (FTE)	515	353	1867	TBC	N/A	TBC	233	308	5963
Recreation	Economic Impact 2022 (£ millions)	15.20	10.27	51.15	TBC	N/A	TBC	6.63	9.34	168.00
	Economic Impact 2019 (£ millions)	15.60	11.27	51.40	TBC	N/A	TBC	7.21	10.54	181.00
	Share of total Direct Revenue	11.13%	11.37%	10.07%	TBC	N/A	TBC	11.15%	9.96%	10.55%
	Sector size compared to pre-pandemic (2019)	97.41	91.13	99.51	TBC	N/A	TBC	91.93	88.63	92.82
	Total Employment (FTE)	253	171	852	TBC	N/A	TBC	110	156	2797
Shopping	Economic Impact 2022 (£ millions)	47.35	33.84	144.16	TBC	N/A	TBC	21.60	25.55	542.00
	Economic Impact 2019 (£ millions)	49.85	37.72	144.92	TBC	N/A	TBC	23.76	29.72	591.00
	Share of total Direct Revenue	34.69%	37.45%	28.37%	TBC	N/A	TBC	36.33%	27.23%	34.02%
	Sector size compared to pre-pandemic (2019)	94.98	89.71	99.48	TBC	N/A	TBC	90.91	85.97	91.71
	Total Employment (FTE)	593	424	1805	TBC	N/A	TBC	270	320	6785
Transport	Economic Impact 2022 (£ millions)	18.91	13.93	64.40	TBC	N/A	TBC	8.61	10.63	219.00
	Economic Impact 2019 (£ millions)	19.43	15.22	64.09	TBC	N/A	TBC	9.33	12.06	235.00
	Share of total Direct Revenue	13.86%	15.42%	12.67%	TBC	N/A	TBC	14.47%	11.33%	13.75%
	Sector size compared to pre-pandemic (2019)	97.35	91.52	100.48	TBC	N/A	TBC	92.21	88.14	93.19
	Total Employment (FTE)	116	85	395	TBC	N/A	TBC	53	65	1341

Table 3: STEAM Data Visitor Summary 2022 by Segment: South Kesteven vs Lincolnshire Comparators (Greater Lincolnshire: Lincolnshire & Rutland)										
Visitor Type	Indicators	South Kesteven	West Lindsey	East Lindsey	North Kesteven	South Holland	City of Lincoln	Boston	Rutland	Greater Lincolnshire
Total	Total Economic Impact (£)	218,180,000	145,660,000	824,200,000	Awaiting sign off	N/A	Awaiting sign off	95,130,000	149,510,000	2,621,000,000
	Visitor Numbers	3,145,000	2,190,000	4,482,000	TBC	N/A	TBC	1,302,000	1,514,000	30,820,000
	Percentage change in visitor numbers 2019-2022	-9.00%	-13.92%	-8.68%	TBC	N/A	TBC	-13.32%	-18.95%	-13.04%
	Visitor Days	3,974,000	2873000	13,080,000	TBC	N/A	TBC	1,799,000	2,186,000	46,100,000
	Average Visitor Spend per visit (£)	£69.37	£66.51	£183.89	TBC	N/A	TBC	£73.06	£98.75	£85.04
	Percentage change in average visitor spend 2019-2022	8.27%	5.77%	9.61%	TBC	N/A	TBC	6.46%	15.73%	7.64%
Day	Total Economic Impact (£)	118,890,000	847,00,000	111,800,000	TBC	N/A	TBC	47,800,000	54,260,000	117,500,000
	Sector size compared to pre-pandemic (2019)	88.88	84.32	84.38	TBC	N/A	TBC	84.17	78.05	84.65
	Visitor Numbers	2,722,000	1,939,000	2,560,000	TBC	N/A	TBC	1,094,000	1,242,000	2,606,0000
	Share of total visitors	86.55%	88.54%	57.12%	TBC	N/A	TBC	84.02%	82.03%	84.56%
	Percentage change in visitor numbers 2019-2022	-11.13%	-15.70%	-15.62%	TBC	N/A	TBC	-15.85%	-21.98%	-15.33%
	Visitor Days	2,722,000	1,939,000	2,560,000	TBC	N/A	TBC	1,094,000	1,242,000	26,060,000
	Average Visitor Spend per visit (£)	£43.68	£43.68	£43.67	TBC	N/A	TBC	£43.69	£43.69	£45.09
	Percentage change in average visitor spend 2019-2022	0.02%	0.02%	0.01%	TBC	N/A	TBC	0.02%	0.04%	-0.01%
Staying: Total	Total Economic Impact (£)	99,290,000	609,60,000	712,400,000	TBC	N/A	TBC	47,340,000	95,250,000	1,446,000,000
	Sector size compared to pre-pandemic (2019)	113.22	102.42	103.11	TBC	N/A	TBC	102.25	105.97	102.41
	Visitor Numbers	423,400	250900	1,922,000	TBC	N/A	TBC	207,400	271,800	4,757,000
	Share of total visitors	13.45%	11.46%	42.88%	TBC	N/A	TBC	15.93%	17.95%	15.43%
	Percentage change in visitor numbers 2019-2022	7.76%	3.12%	2.56%	TBC	N/A	TBC	2.78%	-1.38%	2.02%
	Visitor Days	1,251,500	933,600	10,520,000	TBC	N/A	TBC	704,500	943,500	20,040,000
	Average Visitor Spend per visit (£)	£234.51	£242.97	£370.66	TBC	N/A	TBC	£228.25	£350.44	£303.97
	Percentage change in average visitor spend 2019-2022	5.06%	-0.68%	0.54%	TBC	N/A	TBC	-0.51%	7.46%	0.38%
Staying: Serviced	Total Economic Impact (£)	3,778,0000	4657000	98,360,000	TBC	N/A	TBC	10,460,000	47,210,000	325,920,000
	Sector size compared to pre-pandemic (2019)	96.82	90.69	90.30	TBC	N/A	TBC	94.32	101.66	94.26
	Visitor Numbers	140,900	19300	413,400	TBC	N/A	TBC	42,100	128,500	1,160,000
	Percentage change in visitor numbers 2019-2022	0.79%	-6.31%	-7.74%	TBC	N/A	TBC	-4.32%	-7.75%	-4.92%
	Visitor Days	268,100	36400	811,600	TBC	N/A	TBC	82,900	272,200	2,382,000
	Average Visitor Spend per visit (£)	£268.13	£241.30	£237.93	TBC	N/A	TBC	£248.46	£367.39	£280.97
	Percentage change in average visitor spend 2019-2022	-3.93%	-3.20%	-2.12%	TBC	N/A	TBC	-1.42%	10.20%	-0.86%
Staying: Non-serviced	Total Economic Impact (£)	32,210,000	34,980,000	581,160,000	TBC	N/A	TBC	20,680,000	38,520,000	866,620,000
	Sector size compared to pre-pandemic (2019)	156.51	103.74	105.55	TBC	N/A	TBC	105.03	111.65	105.95
	Visitor Numbers	68,300	75,600	1,269,000	TBC	N/A	TBC	46,900	73800	1,863,000
	Percentage change in visitor numbers 2019-2022	43.49%	5.59%	6.02%	TBC	N/A	TBC	5.63%	4.09%	6.52%
	Visitor Days	475,300	527,400	9,142,000	TBC	N/A	TBC	340,600	506,300	13,370,000
	Average Visitor Spend per visit (£)	£471.60	£462.70	£457.97	TBC	N/A	TBC	£440.94	£521.95	£465.17
	Percentage change in average visitor spend 2019-2022	9.08%	-1.75%	-0.43%	TBC	N/A	TBC	-0.57%	7.26%	-0.54%
Staying: SFR (Staying with friends or relatives)	Total Economic Impact (£)	29,300,000	21,320,000	32,880,000	TBC	N/A	TBC	16,210,000	9,511,000	253,540,000
	Sector size compared to pre-pandemic (2019)	104.27	103.14	104.75	TBC	N/A	TBC	104.45	106.40	102.14
	Visitor Numbers	214,100	155,900	239,900	TBC	N/A	TBC	118,400	69,600	1,734,000
	Percentage change in visitor numbers 2019-2022	4.18%	3.18%	4.71%	TBC	N/A	TBC	4.41%	6.42%	2.30%
	Visitor Days	508,200	369,800	570,300	TBC	N/A	TBC	281,100	164,900	4,289,000
	Average Visitor Spend per visit (£)	£136.85	£136.75	£137.06	TBC	N/A	TBC	£136.91	£136.65	£146.22
	Percentage change in average visitor spend 2019-2022	0.08%	-0.03%	0.03%	TBC	N/A	TBC	0.04%	-0.02%	-0.15%

Table 4: STEAM Visitor Data Summary for South Kesteven: 2022

Table combines and summarises pages 16-43 of the South Kesteven STEAM Visitor Report 2022. Financial data is indexed to 2022 prices (pages 54-59), enabling an appropriate comparison between 2022 and the pre-pandemic period (2019). Total Economic Impact is inclusive of direct spending, VAT and indirect spending. Additional calculations have been made for Average Visitor Spend per day: Total Economic Impact/Visitor Days, Average Visitor Spend per visit: Total Economic Impact/Visitor Numbers, and Average duration of stay: Visitor Days/Visitor Numbers.

Visitor Type	Indicators	Annual 2022	Annual 2019	Percentage change 2019-2022	Quarter 1			Quarter 2			Quarter 3			Quarter 4			Quarterly Totals			
					Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4
Total	Total Economic Impact (£ millions)	218.18	221.450	-1.48%	11.48	13.64	18.33	15.92	23.3	23.03	23.92	33.68	18.55	14.76	10.41	11.16	43.45	62.26	76.15	36.32
	Visitor Numbers	3,145,000	3,456,000	-9.00%	148,000	194,000	293,000	216,000	352,000	343,000	338,000	526,000	260,000	221,000	133,000	121,000	636,000	911,000	1,123,000	475,000
	Visitor Days	3,974,000	4,150,000	-4.24%	206,000	228,000	340,000	290,000	441,000	428,000	436,000	436,000	342,000	270,000	169,000	180,000	774,000	1,159,000	1,421,000	619,000
	Average Visitor Spend per day	£54.90	£53.36	2.89%	£55.73	£59.82	£53.91	£54.90	£52.83	£53.81	£54.86	£77.25	£54.24	£54.67	£61.60	£62.00	£56.14	£53.72	£53.59	£58.68
	Average Visitor Spend per visit	£69.37	£64.08	8.27%	£77.57	£70.31	£62.56	£73.70	£66.19	£67.14	£70.77	£64.03	£71.35	£66.79	£78.27	£92.23	£68.32	£68.34	£67.81	£76.46
	Total Employment	2754	2752	0.07%	2039	2196	2775	2528	3352	3297	3360	4513	2802	2377	1853	1951	2337	3059	3558	2060
Day	Total Economic Impact (£ millions)	118.89	133.76	-11.12%	4.945	6.975	11.5	7.937	13.67	13.46	12.99	21.09	9.804	8.553	4.527	3.429	23.42	35.07	43.89	16.51
	Visitor Numbers	2,722,000	3,063,000	-11.13%	113,000	160,000	263,000	182,000	313,000	308,000	297,000	483,000	224,000	196,000	104,000	79,000	536,000	803,000	1,005,000	378,000
	Visitor Days	2,722,000	3,063,000	-11.13%	113,000	160,000	263,000	182,000	313,000	308,000	297,000	483,000	224,000	196,000	104,000	79,000	536,000	803,000	1,005,000	378,000
	Average Visitor Spend per day	£43.68	£43.67	0.02%	£43.76	£43.59	£43.73	£43.61	£43.67	£43.70	£43.74	£43.66	£43.77	£43.64	£43.53	£43.41	£43.69	£43.67	£43.67	£43.68
	Average Visitor Spend per visit	£43.68	£43.67	0.02%	£43.76	£43.59	£43.73	£43.61	£43.67	£43.70	£43.74	£43.66	£43.77	£43.64	£43.53	£43.41	£43.69	£43.67	£43.67	£43.68
	Total Employment	907	1030	-11.94%	453	639	1053	727	1252	1233	1189	1931	898	783	414	314	715	1070	1340	504
Staying: Total	Total Economic Impact	99.29	87.7	13.22%	6.535	6.667	6.826	7.987	9.63	9.566	10.93	12.59	8.751	6.202	5.879	7.729	20.03	27.18	32.27	19.81
	Visitor Numbers	423,400	392,900	7.76%	35,100	34,400	30,100	34,200	38,600	38,000	40,300	42,800	35,600	25,300	29,800	42,500	99,600	107,600	118,700	97,500
	Visitor Days	1,251,500	1,086,700	15.17%	92,800	68,700	76,300	108,500	127,700	120,200	138,300	161,200	117,000	74,100	65,600	101,000	237,900	356,400	416,500	240,800
	Average Visitor Spend per day	£79.34	£80.70	-1.69%	£70.42	£97.05	£89.46	£73.61	£75.41	£79.58	£79.03	£78.10	£74.79	£83.70	£89.62	£76.52	£84.20	£76.26	£77.48	£82.27
	Average Visitor Spend per visit	£234.51	£223.21	5.06%	£186.18	£193.81	£226.78	£233.54	£249.48	£251.74	£271.22	£294.16	£245.81	£245.14	£197.28	£181.86	£201.10	£252.60	£271.86	£203.18
	Average duration of stay (days)	2.96	2.77	6.87%	2.64	2.00	2.53	3.17	3.31	3.16	3.43	3.77	3.29	2.93	2.20	2.38	2.39	3.31	3.51	2.47
	Total Employment	1364	1230	10.89%	1285	1205	1236	1379	1479	1453	1529	1674	1409	1201	1169	1349	1242	1437	1537	1239
Staying: Serviced	Total Economic Impact (£ millions)	37.78	39.02	-3.18%	1.769	4.377	3.749	2.402	3.211	3.881	3.276	3.627	2.659	2.744	3.226	2.859	9.895	9.494	9.562	8.83
	Visitor Numbers	140,900	139,800	0.79%	6300	20900	14,100	7500	10,100	11,000	10,700	9,600	11,000	8,300	15,400	16,000	41,300	28,600	31,300	39,700
	Visitor Days	268,100	266,900	0.45%	12,900	31,600	27,100	17,100	23,100	27,900	21,800	24,200	19,000	19,700	23,200	20,500	71,600	68,100	65,000	63,400
	Average Visitor Spend per day	£140.92	£146.20	-3.61%	£137.13	£138.51	£138.34	£140.47	£139.00	£139.10	£150.28	£149.88	£139.95	£139.29	£139.05	£139.46	£138.20	£139.41	£147.11	£139.27
	Average Visitor Spend per visit	£268.13	£279.11	-3.93%	£280.79	£209.43	£265.89	£320.27	£317.92	£352.82	£306.17	£377.81	£241.73	£330.60	£209.48	£178.69	£239.59	£331.96	£305.50	£222.42
	Average duration of stay (days)	1.90	1.91	-0.33%	2.05	1.51	1.92	2.28	2.29	2.54	2.04	2.52	1.73	2.37	1.51	1.28	1.73	2.38	2.08	1.60
	Total Employment	805	781	3.07%	736.00	876.00	840.00	764.00	809.00	847.00	801.00	818.00	780.00	784.00	812.00	791.00	817.33	806.67	799.67	795.67
Staying: Non-serviced	Total Economic Impact (£ millions)	32.21	20.58	56.51%	0.804	0.85	1.447	2.139	3.921	3.739	4.69	5.82	4.329	1.882	1.355	1.232	3.1	9.799	14.84	4.469
	Visitor Numbers	68,300	47,600	43.49%	1300	1600	2800	4600	8800	7700	9100	12,200	10,600	4200	3300	2200	5800	21,100	31,800	9700
	Visitor Days	475,300	332,400	42.99%	11,200	12,100	21,000	31,600	61,300	58,500	65,100	82,600	67,500	27,100	19,900	17,500	44,300	151,400	215,200	64,400
	Average Visitor Spend per day	£67.77	£61.91	9.46%	£71.79	£70.25	£68.90	£67.69	£63.96	£63.91	£72.04	£70.46	£64.13	£69.4						

Visitor Type	Indicators	Annual 2022	Annual 2019	Percentage change 2019-2022	Quarter 1			Quarter 2			Quarter 3			Quarter 4			Quarterly Totals			
					Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4
Staying: SFR (Staying with friends or relatives)	Total Economic Impact (£ millions)	29.3	28.1	4.27%	3.963	1.441	1.63	3.446	2.498	1.946	2.961	3.142	1.763	1.577	1.297	3.638	7.033	7.89	7.865	6.512
	Visitor Numbers	214,100	205,500	4.18%	27,500	11,900	13,100	22,210	19,700	16,100	20,500	21,000	14,100	12,800	11,100	24,300	52,500	57,900	55,600	48,100
	Visitor Days	508,200	487,400	4.27%	68,700	25,000	28,300	59,800	43,300	33,700	51,300	54,500	30,600	27,300	22,500	63,100	122,000	136,800	136,400	112,900
	Average Visitor Spend per day	£57.65	£57.65	0.00%	£57.69	£57.64	£57.60	£57.63	£57.69	£57.74	£57.72	£57.65	£57.61	£57.77	£57.64	£57.65	£57.65	£57.68	£57.66	£57.68
	Average Visitor Spend per visit	£136.85	£136.74	0.08%	£144.11	£121.09	£124.43	£155.16	£126.80	£120.87	£144.44	£149.62	£125.04	£123.20	£116.85	£149.71	£133.96	£136.27	£141.46	£135.38
	Average duration of stay (days)	2.37	2.37	0.08%	2.50	2.10	2.16	2.69	2.20	2.09	2.50	2.60	2.17	2.13	2.03	2.60	2.32	2.36	2.45	2.35
	Total Employment	227	220	3.18%	368	134	151	320	232	181	275	292	164	146	121	338	218	244	243	202



SOUTH
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COUNCIL



Culture and Leisure Overview and Scrutiny Committee

30 November 2023

Report of Councillor Richard Cleaver,
Leader of South Kesteven District
Council

Grantham High Street Heritage Action Zone Programme Update – as at September 2023

Report Author

Claire Saunders, High Street Heritage Action Zone Project Manager

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Purpose of Report

This report provides an update on the progress of the High Street Heritage Action Zone storefront regeneration programme, aimed at helping unlock the heritage potential of the town and assist in economic recovery within Grantham Town Centre.

Recommendation

It is recommended the Culture and Leisure Overview and Scrutiny Committee:

1. **Reviews and endorses the report first presented to both the Finance and Economy Overview and Scrutiny Committee on 19 September 2023 and Rural and Communities Overview and Scrutiny Committee on 11 October 2023.**
2. **Agrees to receive a report on the closure of the programme in six months.**
3. **Is invited to share any comments they may have on this report with the programme board.**

Decision Information

Does the report contain any
exempt or confidential
information not for publication?

No

What are the relevant corporate
priorities?

Growth and our economy

Which wards are impacted?

Grantham St Wulfram's Ward

1. Implications

Taking into consideration implications relating to finance and procurement, legal and governance, risk and mitigation, health and safety, diversity and inclusion, staffing, community safety, mental health and wellbeing and the impact on the Council's declaration of a climate change emergency, the following implications have been identified:

Finance and Procurement

1.1 The full financial implications are set out in Appendix A.

Completed by: Richard Wyles, Deputy Chief Executive and s151 Officer

Legal and Governance

1.2 To avoid unnecessary duplication please see the information provided in **Appendix A**.

Risk and Mitigation

1.3 To avoid unnecessary duplication please see the information provided in **Appendix A**.

1.4 A risk register has been produced for the programme and can be found at **Appendix B**.

Health and Safety

1.5 To avoid unnecessary duplication please see the information provided in **Appendix A**.

Diversity and Inclusion

1.6 To avoid unnecessary duplication please see the information provided in **Appendix A**.

Is an Equality Impact Assessment required?

No

Climate Change

1.7 To avoid unnecessary duplication please see the information provided in **Appendix A**.

2. Background to the Report

2.1 The delivery of the High Street Heritage Action Zone programme formally falls within the Economic Development function of the Council, and therefore under the remit of the Finance and Economic Overview and Scrutiny Committee (FEOSC).

2.2 Regular reports are submitted to FEOSC for consideration. The last report to be presented to FEOSC was in September 2023. This was the first report to be submitted to the committee since the Local Government Elections in May 2023.

2.3 Prior to the May elections the High Street Heritage Action Zone programme fell under the remit of the Culture and Leisure Overview and Scrutiny Committee as a heritage programme, and as such an update on the programme remains on the work plan of the Culture and Leisure OSC.

2.4 An update report was originally submitted to the Finance and Economic Overview and Scrutiny Committee in September 2023, which was then further submitted to the Rural and Communities Overview and Scrutiny Committee on 11 October 2023, as Shopfronts and funding now fall within the remit of that committee. The report is attached to this precis at **Appendix A**.

2.4 The programme risk register is included as **Appendix B**.

3. Key Considerations

3.1 To avoid unnecessary duplication, please see the information provided in **Appendix A**.

4. Other Options Considered

4.1 To avoid unnecessary duplication please see the information provided in **Appendix A**.

5. Reasons for the Recommendations

- 5.1 The Culture and Leisure Overview and Scrutiny Committee has heritage as part of their remit. Sharing this update report will allow the Committee to carry out its overall function.
- 5.2 Closure reports serve an important procedural function by presenting findings to all invested parties. Closure reports make it easy to revisit findings and project details should the need arise. The report typically includes vital records of phase information, sign-off documentation, client and management approvals and any changes to the original plan. It is for this reason agreement is being sought from the Culture and Leisure Overview and Scrutiny Committee to receive a further update in six months' time on the progress associated with the closure of the Grantham High Street Heritage Action Zone Programme.

6. Appendices

- 6.1 Appendix A - '*Grantham High Street Heritage Action Zone – programme update 2023*' – Report to the Finance and Economy Overview and Scrutiny committee, 19th September 2023.
- 6.2 Appendix B – Programme Risk Register

7. Background Papers

- 7.1 *Update on Heritage Action Zone shop front improvements in Grantham* – Report to Culture and Visitor Economy Overview and Scrutiny Committee, published 28 February 2023 and available online at:
<https://moderngov.southkesteven.gov.uk/documents/s37009/Update%20on%20Heritage%20Action%20Zone%20shop%20front%20improvements%20in%20Grantham.pdf>
- 7.2 *Grantham High Street Heritage Action Zone Scheme* – Report to Cabinet, published 12 July 2022 and available online at:
<https://moderngov.southkesteven.gov.uk/mgAi.aspx?ID=28342>

South Kesteven District Council Report to Rural and Communities Overview and Scrutiny Committee: 11th October 2023

Appendix A – Report as originally presented to Finance and Economic Overview and Scrutiny Committee



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KESTEVEN
DISTRICT
COUNCIL



Finance and Economic Overview and Scrutiny Committee

19 September 2023

Report of Councillor Richard Cleaver,
Leader of South Kesteven District Council

Grantham High Street Heritage Action Zone Programme Update - September 2023

Report Author

Claire Saunders, High Street Heritage Action Zone Project Manager

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Purpose of Report

This report provides an update on the progress of the High Street Heritage Action Zone storefront regeneration programme, aimed at helping unlock the heritage potential of the town and assist in economic recovery within Grantham Town Centre.

Recommendation

That the Finance and Economic Overview and Scrutiny Committee:

1. Recommends this update report is shared with the Rural and Communities Overview and Scrutiny Committee who have shop front designs and funding as part of their remit.

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2. Agrees to receive a further update in six months' time on the progress associated with the closure of the Grantham High Street Heritage Action Zone Programme.
3. Is invited to share any comments they may have on this report with the programme board.

Decision Information

Does the report contain any No
exempt or confidential
information not for publication?

What are the relevant corporate Growth and our economy
priorities?

Which wards are impacted? Grantham St Wulfram's Ward

1. Implications

Taking into consideration implications relating to finance and procurement, legal and governance, risk and mitigation, health and safety, diversity and inclusion, staffing, community safety, mental health and wellbeing and the impact on the Council's declaration of a climate change emergency, the following implications have been identified:

Finance and Procurement

- 1.1 The total allocation for the High Street Heritage Action Zone programme in the 2023/24 financial year is £280,106 of which £213,093 is allocated to capital projects, and £67,013 is allocated to revenue.
- 1.2 The allocation comprises of £125,475 in grant funding from Historic England and £154,711 in match funding from South Kesteven District Council.
- 1.3 Within this financial year, South Kesteven District Council's match contribution will exceed the grant value received from Historic England. This is due to permitted underpayments in previous years which Historic England have agreed in previous years to maximise grant drawdown.
- 1.4 Services and materials relating to capital projects are procured and commissioned directly by the grant recipient. They must follow Historic England's procurement requirements and provide evidence of this.

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- 1.5 A grant clawback clause applies if a property which has received a grant is sold, otherwise disposed of, or significantly changed within three years of the final grant payment.

Richard Wyles s151 Officer

Legal and Governance

- 1.6 The programme is overseen by the combined Future High Street Fund and High Street Heritage Action Zone Project Board (the Board), which includes Councillors, Senior Officers and Historic England.
- 1.7 Programme spend up to £200,000 is assessed by the Board which provides a recommendation for approval or otherwise by the relevant senior officer through their existing delegated powers.
- 1.8 Programme spend of more than £200,000 is assessed by the Board and referred to Cabinet for recommendation to Historic England for approval.
- 1.9 Any project grant which results in a contribution from Historic England of £50,000 or more is referred to Historic England for formal approval.

Completed by: Graham Watts, Assistant Director of Governance and Monitoring Officer

Risk and Mitigation

- 1.10 A risk register has been produced for the programme and can be found at **Appendix B**.
- 1.11 Under the grant conditions imposed by the Treasury, it is not possible for grant funding to be rolled forwards into future financial years. As such, any underspend is lost.
- 1.12 The most significant risk to the programme is the timescales for project delivery, as projects must complete prior 31 March 2024 to receive funding. This is exacerbated by the requirement, in most instances, to use specialist contractors; and the number of other similar regeneration projects taking place nationally.

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- 1.13 Materials shortages, particularly steel and hardwoods usually sourced from eastern Europe, also impact the delivery timetable for projects. As mitigation projects must be fully tendered before applicants are able to submit a full application.
- 1.14 As with any works on a historic building, timescales may also be impacted by unexpected discoveries, such as structural issues identified during the course of works.

Health and Safety

Contractors are responsible for maintaining appropriate health and safety on site and must comply with all the relevant legislation. South Kesteven District Council is responsible for ensuring that appointed contractors provide evidence of Health and Safety competencies and supporting documents, including risk assessments safe systems of work and other relevant documents, as well as implementing contractor monitoring to provide assurance that works are undertaken in a safe and responsible manner.

Diversity and Inclusion

- 1.15 Eligibility for the grant schemes is limited by the terms of the funding agreement with Historic England.
- 1.16 Properties must be located on High Street, Westgate, the Market Place or Watergate, (with a priority on Westgate and Marketplace) and must have been built prior to 1939.
- 1.17 Applicants must have the legal ability to accept the grant funding, typically the property owner. Tenants with full maintaining leases may apply but must do so with the written permission of the property owner.

Is an Equality Impact Assessment required?

No

Climate Change

- 1.18 The programme encourages the retention of as much original material as possible. While this is primarily to maintain the historic fabric of buildings, it also prevents unnecessary use of new resources.

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- 1.19 Traditional building methods are often lower carbon options than their modern counterparts, for example the use of lime-based mortars and renders generates less CO₂ than the equivalent volumes of cement-based products.
- 1.20 The scheme acknowledges the amount of embodied carbon within historic buildings, and ultimately supports bring vacant or underutilised properties back in to use, reducing the requirement for new build properties.

2. Background to the Report

- 2.1 Grantham's High Street Heritage Action Zone programme's approach contributes directly to South Kesteven District Council's Corporate Plan (2020-2023) vision which aims to establish South Kesteven as the best district in which to live, work and visit. Local heritage assets help build a sense of local identity and distinctiveness, a sense of history, place and belonging.
- 2.2 As previously reported to both the (then) Culture and Visitor Economy Overview and Scrutiny Committee and Cabinet, the High Street Heritage Action Zone programme is an England-wide funding programme which, alongside the Future High Street Fund, is the result of the Governments' 2018 commitment to support the regeneration of town centres. The £1.25 million Grantham High Street Heritage Action Zone programme is made up of £886,540 from Historic England and £375,660 contribution from the Council.
- 2.3 The four-year programme began in April 2020 and will run until 31 March 2024 and includes capital work projects (shopfront scheme and 'Key Building 'regeneration scheme), as well as funding for community engagement, consultation and legacy planning.
- 2.4 The capital programme supports private owners of properties to complete works to reinstate, restore and maintain historic properties within the targeted areas of Westgate, Market Place and High Street. None of the properties in receipt of grant funding are owned or leased by the Council.
- 2.5 Members have received regular updates on progress. Accordingly, the remainder of this report builds upon the 28 February 2023 report and provides an update on the following five items: (A) Westgate Hall, (B) shopfront regeneration, (C) conservation area management plan (D), trail tale app, and (E) cultural programme.

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Programme Updates

(A) Westgate Hall

- 2.6 The Westgate Hall regeneration project is progressing well, however, there have been some slight delays in the initial delivery schedule as a result of a need to discharge a number of planning conditions with regards to roof treatments before the materials could be ordered.
- 2.7 It is now anticipated the grant aided works will complete in October 2023, following which the property owner and tenant will continue to deliver fit out works.
- 2.8 Following negotiations with Historic England in March 2023, the Council were able to draw down the full value of their grant prior to the end of the 2022/2023 financial year, which ensured no grant funding was lost. To enable this, Historic England agreed the property owner's contribution, along with £63,294 of the Council's contribution could be expended in 2023/2024 financial year.
- 2.9 As a result of the current high construction costs, it is possible the tenant will look to phase the fit out works to enable his operation of the site to begin as soon as possible. The schedule for fit out has not yet been determined.

(B) Shopfront Regeneration

- 2.10 The programme will deliver nine shopfront regeneration projects, which are outlined in the *Table one*.
- 2.11 Should all projects outlined below progress to completion, all funding allocated to the shopfront regeneration element of the High Street Heritage Action Zone will be expended.

Table one: Progress update on the nine shopfront regeneration projects			
Project	Total Grant	Percentage of eligible costs grant aided	Status
74 Westgate Kays of Grantham	£32,500	66%	Completed
1 Market Place Prime Comfort	£32,500	45%	Completed
21-22 Market Place	£50,000	57%	Ongoing - Programme running to schedule Project progressing well, works

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			to first floor shopfront are completed and scaffolding and hoarding has been removed. Works to ground floor are ongoing.
17-18 High Street Grantham Pharmacy	£75,000	49%	Ongoing - Programme running to schedule. A grant has been offered to the property for upper floor conversion works through the Future High Street Fund. Both projects are due to complete by March 2024
5 Market Place Lindpet House	£14,463	71%	Completed
68 Westgate Delight Pizza	£25,000	76%	Ongoing - Works to shopfront are completed. Works to first floor oriel window remain. This is currently on hold as the upper floor residential tenant is due to leave the property. Works will commence when property is vacant.
71 High Street AddAction	£79,710	80%	Ongoing, at risk – please see paragraph 2.11. Total costs subject to potential increase.
80/81 Highstreet JP Carpets/ Buckley and Wand	£70,000 (£35,000 per unit)	62%	Pending – Property owners have formally accepted the grant offer, and contractors have been appointed. Start date to be confirmed.

2.12 71 High Street (AddAction) remains an at-risk scheme and is significantly behind schedule. The property owners are aware they will not receive any grant funds until the project is completed, and that the project must complete by 31 March 2024.

2.13 Within the past month the property owner has taken back control of the project from the contractor and are looking at appointing a new contractor to complete the works.

(C) Conservation Area Management Plan

2.14 The initial draft of the Conservation area appraisal and management plan, completed by Heritage Lincolnshire, has been received and is currently with the planning team for initial review.

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- 2.15 Any feedback will be passed back to the consultants for amendments.
- 2.16 Following its completion arrangements will be made for the revised draft to be presented to the relevant Council Committees for consultation.

(D) Trail Tale App

- 2.17 The 'Grantham's Hidden Histories' trail has been completed and launched on the free Trail Tale App in June 2023. It has received positive feedback from users along with press coverage, including featuring on BBC Radio Lincolnshire.
- 2.18 The Heritage Action Zone Project Manager will continue to work with the Council's Visitor Economy and Tourism Officer, as well as the Council's Communications team and other relevant Council Officers, to promote the trail as appropriate.

(E) Cultural Programme

- 2.19 The High Street Heritage Action Zone Cultural Programme operates separately from the main grant programme. Funding for cultural activities comes from Historic England and the National Lottery Heritage Fund, with support from Arts Council. There is no financial contribution made by the Council.
- 2.20 The project secured £100,000 in funding which must complete by January 2024. The requirement of the funding is for the programme to be devised and delivered by a Cultural Consortium of six local arts and cultural groups. The Council's role is financial management, guidance and evaluation. The delivery of the Cultural programme is continuing well.
- 2.21 Chantry Dance Company successfully delivered two performances of 'Ghost Dances' in April 2023, contemporary dance performances based on the music of Grantham born composer Nicolas Maw. The free 30-minute performances, held in the Guildhall were attended by approximately 140 people across two nights, and an additional 30 people attended workshop sessions designed specifically to engage groups who would not typically take part in arts activities.
- 2.22 Funding has been released to Grantham Museum to allow for the purchase of a 'community cabinet' which will allow local community groups to stage small exhibitions in the Museum, centred on Grantham's history. There has already been interest from several groups including the Masons and potentially the National Trust.
- 2.23 Likewise, the Museum is close to completing their 'Grantham Timeline' project, supported by the Grantham Civic Society.
- 2.24 Every September thousands of volunteers across England organise events to celebrate history and culture. It provides an opportunity for people to see hidden places and try out new experiences, all of which are free to explore. Heritage Open Days 2023 takes place between 8 and 17 September. Grantham Dramatic Society

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are programming further heritage walks to take place across the National Heritage Open Day's weekend in September, as well as developing a 'stationary tour' to bring the contents of the tour to those who are not able to complete the hour-long walking tour of the town.

2.25 Grantham Arts will shortly complete their 'Community Print' project, which engaged with groups including Earlesfield Positive Futures, refugee groups supported by Jubilee Life Centre and a Grantham Nepalese Community Group, to explore Grantham's architecture through the medium of Linocut prints (a printmaking technique). They will commence a community ceramics project later this year, based out of Grantham Museum.

3. Key Considerations

3.1 The programme is currently within its final year of delivery (completing 31 March 2024). All projects for delivery have been identified. Historic England are no longer able to accept alternative projects.

3.2 The Grantham High Street Heritage Action Zone programme has allowed the Council to leverage significant levels of public and private sector funding. £350,000 has been leveraged through the delivery of shopfront regeneration works and the grant aided elements of the Westgate Hall project. If fit out works to Westgate Hall are also considered, it is estimated the value of private sector investment leveraged by the scheme will be in the region of £550,000.

3.3 The scheme has encouraged and permitted property owners in the town centre to invest in their buildings at a time of rapidly rising costs and financial uncertainty.

3.4 Working closely with the Future High Street Fund Programme Manager, and other Officers within the Growth and Culture Directorate, Officers are ensuring the maximum benefit is derived from both the Council's investment and the grant funding.

3.5 The programme has allowed the Council to develop a strong working relationship with town centre property owners and with Historic England as a funder. This has allowed Officers to be somewhat flexible in the identification and development of individual projects (within the context of the programme design), to maximise the benefits of the scheme.

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4. Other Options Considered

- 4.1 Grantham conservation area is currently considered 'at risk' by Historic England. The deterioration of the town centre heritage was of particular concern. As such, Historic England were keen to support the High Street Heritage Action Zone in Grantham. Without this intervention it is likely retail properties within the town centre would continue to deteriorate and historic features and character would continue to be lost.
- 4.2 The scheme has encouraged significant investment from property owners, who otherwise may not have committed to expenditure without the benefit of grant funding to support the viability cost gap of the projects. Therefore, the 'do nothing' option was discounted.

5. Reasons for the Recommendations

- 5.1 The Rural and Communities Overview and Scrutiny Committee has shop front designs and funding as part of their remit. Sharing this update report will allow that Committee to carry out its overall function.
- 5.2 Closure reports serve an important procedural function by presenting findings to all invested parties. Closure reports make it easy to revisit findings and project details should the need arise. The report typically includes vital records of phase information, sign-off documentation, client and management approvals and any changes to the original plan. It is for this reason, agreement is being sought from the Finance and Economic Overview and Scrutiny Committee to receive a further update in six months' time on the progress associated with the closure of the Grantham High Street Heritage Action Zone Programme.

6. Appendices

- 6.1 Appendix B – Programme Risk Register

7. Background Papers

- 7.1 *Update on Heritage Action Zone shop front improvements in Grantham* – Report to Culture and Visitor Economy Overview and Scrutiny Committee, published 28 February 2023 and available online at:

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<https://moderngov.southkesteven.gov.uk/documents/s37009/Update%20on%20Heritage%20Action%20Zone%20shop%20front%20improvements%20in%20Grantham.pdf>

7.2 *Grantham High Street Heritage Action Zone Scheme* – Report to Cabinet, published 12 July 2022 and available online at:

<https://moderngov.southkesteven.gov.uk/mgAi.aspx?ID=28342>

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Grantham High Street Heritage Action Zone Programme Update – Appendix A: Programme Risk Register

No.	Date risk recorded	Risk	Likelihood	Impact	Risk rating L x I	Mitigation	Who is responsible for managing this risk?	Date risk last reviewed	Status and updates
1	01/05/2020	SKDC or Historic England withdraw funding/ support for project resulting in end of scheme	1 Remote	5 Extreme / Catastrophic	5	Regular reporting of performance, targets met and beneficial impact of the scheme to Grantham to the council via Project board and reports to relevant Oversite and Scrutiny Committees	Project officer	28/07/2023	
2	01/05/2020	Staff Changes at SKDC impact project delivery	3 Possible	3 Moderate	9	Regular and early communication about any staff changes to allow contingency to be put in place/ insure comprehensive handover to new staff.	Head of Economic Development/ Project officer	28/07/2023	Some additional capacity to support delivery of the scheme is now in place due to the appointment of a project support officer within the Economic Development team. However, the number of staff within the Economic Development Team on Fixed Term contracts will continue to pose a risk to staff continuity.
3		Covid-19 restrictions increase, or lifting of restrictions is delayed	1 Remote	3 Moderate	3	Plan contingency activity to ensure compliance with regulations, regular monitoring of updates and changes to regulations.	Project officer	28/07/2023	No restrictions are in place or proposed to be introduced, however vulnerable people may still be hesitant to gather with others
4	01/05/2020	Lack of interest/ engagement from property owners re. shopfront regeneration/ buildings grants	1 Remote	4 Major	4	Ensure early and continued engagement with property owners to inform about the scheme and highlight the benefits.	Project Officer	28/07/2023	There are sufficient projects underway to ensure full expenditure of grant funds for capital projects.

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No.	Date risk recorded	Risk	Likelihood	Impact	Risk rating L x I	Mitigation	Who is responsible for managing this risk?	Date risk last reviewed	Status and updates
5	01/05/2020	Lack of interest/ engagement in community engagement and consultation activity	3 Possible	3 Moderate	9	Work with colleagues within Economic Development team and key partners to make use of all existing contacts and routes to community organisations. Create an effective marketing and promotion strategy. Ensure the programme is diverse in its focus to create broad appeal. Community Engagement plan to be reviewed	Project officer	28/07/2023	Project support officer will assist in delivering community engagement activities to bolster that area of project delivery.
6	01/03/2021	Construction costs rising above inflation	4 Probable	3 Moderate	12	Costs to be monitored thorough out programme delivery and grant adjustments made if necessary	Project officer	28/07/2023	Construction costs continue to be much higher than pre-covid levels. Rapidly rising energy costs, the weak pound, and the Ukraine conflict is expected to contribute to this.
7	01/05/2020	Tender returns for main contractors are higher than current budgetary allowances	4 Probable	3 Moderate	12	Early engagement of owners in capital schemes and cost estimate prepared by Quantity Surveyor in advance of full application.	Project Officer	28/07/2023	Tenders returned for work under the shopfront scheme have been significantly higher than in previous years which has resulted in projects being dropped from the programme as the level of grant funding did not make them viable for the applicants to proceed. To mitigate this, we have negotiated with property owners and amended the grant scheme to make it possible to take some projects forward to delivery.

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No.	Date risk recorded	Risk	Likelihood	Impact	Risk rating L x I	Mitigation	Who is responsible for managing this risk?	Date risk last reviewed	Status and updates
8	01/05/2020	Unforeseen site discoveries such as archaeology, fabric in worse condition than expected, ecology, hazardous materials etc. resulting in project delay or increased costs	3 Possible	3 Moderate	9	Private owners encouraged to allow for contingencies for these types of discoveries common with historic buildings and grant levels to be reviewed as necessary	Project officer	28/07/2023	
9	01/05/2020	Slippage in programme leading to delays and increased cost/ or project underspend	5 Highly Probable	3 Moderate	15	Detailed programme to be worked out during full application stage incorporating satisfactory development time for each area of work. Delivery schedules to be regularly monitored and any slippage resolved at an early stage.	Project officer	28/07/2023	Programme slippage continues to be an issue - largely linked to contractor availability and materials shortages. As new projects receive a finalised grant award, they will be encouraged to begin ordering materials as soon as possible. Applicants are requested to include timeframe for delivery as part of their contractor procurement.
10	01/05/2020	Lack of availability of suitably qualified contractors available to tender for/ complete projects	4 Probable	3 Moderate	12	Project officer to work with project architects and other specialists as necessary to identify suitably qualified contractors. If necessary, will work with the communications team to raise awareness of opportunities to tender.	Project officer	28/07/2023	Difficulty in tendering and low availability of contractors is being reported nationally and locally. This is echoed by the higher-than-normal number of planning applications and listed building consents currently being processed by the planning team. Contractor shortage continues to be a significant issue within the scheme. Some contractors are withdrawing from proposed schemes as they are not able to commit to additional work within the timeframes allotted due to staff/ skills shortages.

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No.	Date risk recorded	Risk	Likelihood	Impact	Risk rating L x I	Mitigation	Who is responsible for managing this risk?	Date risk last reviewed	Status and updates
11	01/05/2020	Lack of communication between SKDC and project board	2 Unlikely	4 Major	8	Continue with regular meetings and reporting	Project officer	28/07/2023	<p>The project board membership has been altered to reflect the new council membership following the District Council Elections.</p> <p>A programme of town tours delivered by the Project Officer will give greater context and understanding of the scheme to interested Councillors.</p>
12	25/03/2020	Proposals for 'Grantham Active Travel Zone' impact on the regeneration of the marketplace, by potentially increasing traffic flow through the marketplace and traffic congestion on Wide Westgate	1 Remote	4 Major	4	Senior officers of relevant bodies are in regular discussion about traffic management ambitions in Grantham.	SKDC Chief exec	28/07/2023	Extensive discussions are ongoing with relevant partners to appropriate treatment of key spaces such as the Market Place



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Culture and Leisure Overview and Scrutiny Committee

30 November 2023

Report of Councillor Paul Stokes,
Portfolio Holder for Culture and Leisure

Council-Funded Arts Venues Operation and Performance

Report Author

Karen Whitfield, Assistant Director (Leisure, Culture and Place)

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Purpose of Report

To provide an update on the current performance of the Council's Arts Venues.

Recommendation

The Culture and Leisure Overview and Scrutiny Committee are requested to:

1. **Examine the information provided in the report relating to the current operating and performance of the Council's three arts venues.**
2. **Support an application to Arts Council England for a project grant to undertake an audience development project.**

Decision Information	
Does the report contain any exempt or confidential information not for publication?	No
What are the relevant corporate priorities?	Healthy and strong communities
Which wards are impacted?	Bourne, Grantham and Stamford Wards

1. Implications

Taking into consideration implications relating to finance and procurement, legal and governance, risk and mitigation, health and safety, diversity and inclusion, safeguarding, staffing, community safety, mental health and wellbeing and the impact on the Council's declaration of a climate change emergency, the following implications have been identified:

Finance and Procurement

- 1.1 The Council's provision of Arts and Cultural activity is a discretionary service and represents a significant annual cost for the Council. It is therefore important that the service can demonstrate value for money whilst delivering the outcomes the Council are seeking.
- 1.2 Given the Council's challenging financial outlook, external funding sources are welcomed to support and improve the Council's arts venues and the services offered. If the Council are successful in attracting external funding, it will be important to ensure that the grant conditions are not onerous and support the Council's wider ambitions.

Completed by: Richard Wyles, Deputy Chief Executive and s151 Officer.

Legal and Governance

- 1.3 There are no significant legal or governance implications arising from this report which are not already referenced in the body of the report.

Completed by: Graham Watts, Assistant Director (Governance and Public Protection), and Monitoring Officer.

2. Background to the Report

- 2.1 The Council's Corporate Plan (2020 to 2023) sets out the Council's ambition to be the best district in which to work, live and visit, with a key objective of building and celebrating the rich heritage and culture of South Kesteven. A strategic priority

contained within the Corporate Plan is to improve and invest in local arts and cultural venues.

- 2.2 At a meeting of the Culture and Leisure Overview and Scrutiny Committee held on 13 June 2023, the Members present considered a draft Cultural Strategy for the district and recommended to Cabinet this be adopted to underpin the Council's corporate priority. The Cultural Strategy (2023 to 2026) was subsequently formally adopted at a meeting of Cabinet held on 11 July 2023.
- 2.3 As part of the service provided, the Council is responsible for three cultural venues within the district, these being the Guildhall Arts Centre in Grantham, Stamford Arts Centre, and the Bourne Corn Exchange. At the meeting of the Culture and Leisure Overview and Scrutiny Committee held on 5 September 2023, it was requested Officers present a report to a future meeting, providing an update on the current operation and performance of the three Council owned venues.

Engagement in Cultural Activity

- 2.4 Nationally it is widely accepted that the extended period of closure because of the COVID-19 pandemic, and the associated recovery period, has changed the behaviour of cultural audiences. According to Arts Council England (ACE) Audience Finder survey, nationally audiences are down by around 26% when compared to pre-COVID levels.
- 2.5 Other significant findings from the Audience Finder survey are that:
 - 61% of people surveyed reported that the cost of living is preventing them from attending as many events as they would like to
 - 40% reported that they now book tickets closer to performances whilst previously they would have booked further in advance
 - A third of respondents reported their spend on arts, culture and heritage was less than pre-pandemic levels.

- 2.6 Despite this information the three Council-owned venues are continuing to recover well, and programming of events is now returning to pre-pandemic levels.

Guildhall Arts Centre, Grantham

- 2.7 The Guildhall Arts Centre is a community centred venue on St Peter's Hill in Grantham and hosts a wide range of events and activities, including professional touring shows and an extremely successful Christmas pantomime. Several local amateur groups hire the theatre for community shows and events and the venue is a hub for cultural activity, hosting workshops for all ages. The Arts Centre has a

suite of meeting rooms which are hired for internal and external meetings, fairs, conferences, parties, and weddings.

2.8 The programme at the Guildhall Arts Centre has gone from strength to strength since it reopened following the lifting of COVID restrictions. **Table One** below provides a review of the programme for the period April 2023 to October 2023 when compared to the same period of April 2019 to October 2019, demonstrating audiences and income from tickets have in fact grown.

Table One: Comparison of 2023 performance with pre-pandemic levels		
Guildhall Arts Centre	April 2019 – October 2019	April 2023 – October 2023
Number of Events	104	102
Value of tickets sold	£85000	£112000
Percentage of Capacity Filled	53%	57%
Average Ticket Price	£8.68	£11.99

2.9 The coffee shop at the Guildhall Arts Centre is leased to a private operator under the name Digby's Café and opened in May 2022. The coffee shop has proved popular, providing a selection of hot drinks and cakes, together with a lunch and breakfast menu. Digby's provide the bar service which is open when there are events and performances.

2.10 The Guildhall Arts Centre is a Grade II listed building, which does present some challenges in terms of repairs and maintenance and energy efficiency. Currently works are being undertaken to repair the roof to both ensure the building is watertight and alleviate the periodic rainwater leaks which are experienced.

2.11 In addition, it is planned to replace the current boiler system which is old and ineffective. It is anticipated this will improve the energy efficiency of the building and ensure it remains attractive to users.

2.12 A proportion of the Guildhall Arts Centre is currently hired out to Lincolnshire County Council who host their St John's adult day care provision from the facility. In addition, the Arts Centre currently hosts the Council's Customer Services team until a permanent venue for the service is secured.

Stamford Arts Centre

2.13 Stamford Arts Centre is located on St Mary's Street in Stamford and provides opportunities to experience and participate in a wide selection of art forms including theatre, cinema, music and poetry, sculpture, dance, painting, and drawing.

2.14 As well as hosting professional theatre touring companies, Shoestring Theatre Company are the Centre's resident company and provide additional performances. A range of concerts are hosted in the Ballroom, together with dances and

workshops. Stamford Arts Centre has a range of meeting rooms which are used for meetings, fairs, conferences, parties, and weddings.

- 2.15 The Cellar Bar is a more intimate setting, hosting a range of smaller performances, including music and comedy, as well as being available for hire for events and gatherings.
- 2.16 The main gallery within the centre accommodates a varied programme of contemporary exhibitions from local and international artists including photography, painting, textile, drawing and sculpture.
- 2.17 The coffee shop in Stamford Arts Centre has recently been leased and operates as the Grounded Coffee Shop. Already this is proving popular with customers and serves a selection of hot drinks and cakes. The menu is gradually expanding to include breakfast items, together with filled croissants and bagels.
- 2.18 The Gallery Bar is managed by the Council and provides a bar service to complement events and performances.
- 2.19 The programme at Stamford Arts Centre is returning to pre-COVID levels. **Table Two** below provides a review of the programme for the period April 2023 to October 2023 when compared to the same period of April 2019 to October 2019.

Table Two: Comparison of 2023 performance with pre-pandemic levels

Stamford	April 2019 – October 2019	April 2023 – October 2023
Number of Events	287	163
Value of tickets sold	£115009	£90650
Percentage of Capacity Filled	56.47%	50.51%
Average Ticket Price	£11.97	£13.75

- 2.20 There are several factors why the number of events has reduced in 2023, in particular, as a result of a review of the service, the opening hours were assessed and the number of events which did not generate an income accordingly reduced. In addition, due to ongoing roofing works, it has not been possible to host matinee cinema showings due to the noise and disruption encountered whilst the works are ongoing. Despite this, it is pleasing to note, although the number of events has reduced by 43%, the centre has achieved 78% of the previous income level. The programme is kept under constant review and is something the team will continue to work on.
- 2.21 In line with the national picture, there remains a major challenge in attracting audiences for the film programme at Stamford Arts Centre. The introduction of more film streaming services has seen cinema audiences decline nationally and less films have been available as film production was halted during the COVID pandemic. Over the coming months, the recently appointed Stamford Arts Centre Manager will

be re-establishing a brand for the cinema, ensuring this is attractive to customers and that film audiences continue to grow.

- 2.22 Stamford Arts Centre is also a Grade II listed building. During the period March 2023 to October 2023, re-roofing works have taken place to ensure the building is watertight. This has been a significant undertaking and costly due to the specialist nature of the Collyweston slate roofing tiles. Although the Centre was able to remain open for the period the works were taking place, usage was significantly restricted during the daytime.
- 2.23 Other works which have been undertaken recently include a refurbished foyer area with the introduction of a customer contact hub (providing telephone and on-line services for customers) and a full refurbishment of the customer toilets.

Bourne Corn Exchange

- 2.24 Bourne Corn Exchange is situated on Abbey Road in Bourne and is more of a community venue, rather than a traditional theatre. A range of services and activities are provided from the Corn Exchange, these include live events and an annual pantomime. The facility offers meeting spaces for a range of community events, including dinner dances, talks, meetings and a regular Sunday carvery.
- 2.25 Co-located within Bourne Corn Exchange are the offices for Bourne Town Council and the Community Access Point. This began operation in 2013, bringing together the services offered by South Kesteven District Council and Lincolnshire County Council (LCC). These services include the public library and Registry Office services and, in addition, a proportion of the upstairs office space is leased to LCC as drop down office space. The remainder of the upstairs office space is available for South Kesteven District Council Officers and has been added to the desk booking system.
- 2.26 Programmed performances at Bourne Corn Exchange are nearly back to pre-COVID levels. A particular recent success was the 'Ultra 1990s vs 2000s' show which was held on 7 October 2023 and achieved sales of over 300 tickets in just two weeks.
- 2.27 The Sunday carvery remains extremely popular and serves between 80 and 100 customers fortnightly. Other organisations using the Corn Exchange include the Organ Club, South Kesteven Musical Players, Taekwondo, Dementia Support, and the Blood Donation Service.
- 2.28 Work is being undertaken to integrate the ticketing for events at Bourne Corn Exchange into the Council's ticket system, Spektrix. This integration would allow the Council to sell tickets on behalf of organisations who hire the Corn Exchange, thereby generating additional income by way of commission on ticket sales.

Customer Behaviours

2.29 In line with the national trend identified, customers of the Council's arts venues are choosing to book much closer to events, when compared to pre-COVID data. In addition to this, the way customers book tickets have changed. The arts centres are seeing a move away from in-person and telephone bookings to online bookings. An average of 70% of bookings are now being made online, compared to 41% in January 2019.

2.30 Following an active campaign to encourage customers to register to a mailing list to receive What's on Guides and regular updates on forthcoming performances, the number of subscribers has risen significantly as detailed in **Table Three** below:

Table Three – Comparison of Mailing List Subscribers			
	January 2019	September 2023	Increase
Grantham Arts Centre	6,145	10,172	+4,027
Stamford Arts Centre	8,751	13,381	+4,630

2.31 As well as being available to download online and being distributed to the mailing list, What's on Guides are available in the arts centres. This shift to digital programmes is in line with industry best practice and has saved the Council over £10,000 in postage costs alone. The number of printed copies produced has also been reduced, providing an additional saving of £38,700.

Outreach Activity

2.32 Guildhall Arts Centre and Stamford Arts Centre are both active partners in the Lincolnshire One Venues (LOV) network, a collaboration of mainly public funded arts providers in Lincolnshire.

2.33 As part of this network the Guildhall Arts Centre and Stamford Arts Centre each held a 'LOV Your Venue' event in March. A wide range of activities took place, featuring local groups and performers, as well as professional companies. The activities included street performers, Samba drumming, digital graffiti, virtual reality headset experiences, including providing a marketplace for people to sell their artwork.

2.34 Leading up to the events, community pieces of art were created in free workshops in collaboration with schools and community groups, the resulting artwork being on display for each celebration event.

2.35 The arts team are now busy preparing what can be achieved next year at a similar event along with other community outreach opportunities. Although in the early stages of planning, it is proposed to deliver a community outreach project in Bourne and The Deepings which will culminate in a piece of art, sculpture, or a mural to

reflect the local area's residents, industry or a landmark. Workshops to develop the artwork would be run by a professional artist and available for people of all ages.

Music in Quiet Places

2.36 The arts team run a very successful outreach programme called 'Music in Quiet Places'. These events take classical music to churches in rural villages in South Kesteven. During 2023 four events were held at the following locations:

- St Vincent's Church in Caythorpe
- The Priory Church in Deeping St James
- St Michael and All Angels Church in Uffington
- St Andrew's Church in Billingborough

2.37 A total of 355 tickets were sold across these events and the feedback received was overwhelmingly positive.

Rural Touring – Live and Local Scheme

2.38 South Kesteven make a financial contribution to Live and Local which is a rural touring scheme. Live and Local are funded by Arts Council England (ACE) and are responsible for taking high-quality live performances into rural spaces.

2.39 Performances available include family shows, drama, music and interactive experiences. Local communities apply for the shows, the cost of which are then subsidised by the Council's contribution. In the current financial year, the Council has contributed just over £3,500 into the scheme which has provided a total of 17 performances in village halls and other locations.

Arts Council Funding

2.40 The Guildhall Arts Centre and Stamford Arts Centre were previously part of a consortium which received National Portfolio Organisation (NPO) from ACE. The consortium also included the South Holland Centre in Spalding and Louth Riverhead Theatre.

2.41 Unfortunately the consortium was unsuccessful in their application for NPO support for 2023 – 2026 and therefore the funding came to an end in March 2023. However, a successful application was made for 'transition' funding which was established by ACE to help organisations assess future opportunities and how they could adapt without the funding.

2.42 The Council were the lead applicant for the successful application for transition funding and received £53,950 for the two venues in Grantham and Stamford. The funding has been used to provide a series of diverse events and performances

which otherwise could not have been secured, including Sarah and Duck - a high profile Cbeebies show and The Mozartists who are a nationally renowned orchestra.

- 2.43 The funding also provided a free family fun day in each venue which featured drumming sessions, graffiti, a mobile planetarium, storytelling and arts and crafts. The days were free to attend and generated hundreds of people through the doors of each venue which may not otherwise have visited.
- 2.44 An element of the funding secured consultancy support from Amy Dalton-Hardy to identify areas the Council's arts service should focus on to ensure it remains attractive and serves its local communities. In addition, the work is identifying appropriate funding streams to support the Council's longer term aspirations.

Future Funding Opportunities

- 2.45 The Arts team are currently discussing alternative funding opportunities through ACE and are pulling together a funding bid for a project grant of over £30,000 which will focus on audience development including researching the audience base, identifying people who currently do not attend, and how audience numbers can be increased. This work is important to help the venues adapt after a period of significant change, especially taking into account audience behaviour and spending habits.
- 2.46 If successful, the funding bid will provide a series of 'tester events' to gauge audience responses and influence the programmes at the venues and future aspirations. It is also proposed to develop a board of local and national professional arts practitioners to share ideas and act as critical friends.

Pay It Forward Scheme

- 2.47 Following the meeting of Culture and Leisure Overview and Scrutiny Committee on 5 September 2023, the Pay it Forward scheme was launched. This has been well-received and extremely successful and having only been in operation for just over two months, has received donations totalling £1300.
- 2.48 Already this funding has provided tickets to the pantomime for Harrowby Infants School pupils. Harrowby School have provided the following feedback to the Council:

"We are a deprived school with refugee children, children in care and families accessing the food bank provision. This will be a once in a lifetime opportunity for some of our children."

3. Key Considerations

3.1 This report provides an update on the performance of the Council's arts venues as requested at a meeting of the Culture and Leisure Overview and Scrutiny Committee held on 5 September 2023.

4. Reasons for the Recommendations

4.1 The reasons for the recommendations are aimed at examining how well the Arts Service delivers across a range of cultural, social and economic agendas.

4.2 The report provides Members with information on a potential funding source available to support the delivery of the Arts Service, if successful this will identify lessons learnt which could help improve the service in the future.

Culture and Leisure Overview and Scrutiny Committee 2023/24

WORK PROGRAMME

REPORT TITLE	ISSUE	PURPOSE	ORIGINATED/COMMITTEE HISTORY DATE(S)	CORPORATE/PRIORITY
30 November 2023, 10:00am				
Grantham Mid-Lent Fair – results of consultation	The Showman's Guild wish to extend the opening times for the Mid Lent fair in Grantham for 2024 Lead Officer: Karen Whitfield (Assistant Director for Culture and Leisure)	To consider the results of consultation undertaken to establish support for a change in the dates for Grantham Mid-Lent Fair for 2024	Agenda item agreed by the Committee Chairman during 13 June 2023 meeting	Healthy and Strong Communities
Review of a district-wide Blue Plaque Guide and Information Trails	To provide an update on Government plans to extend the blue plaques scheme outside of London Lead Officer: Nicola McCoy-Brown (Director of Growth and Culture)	To seek support to launch a consultation exercise, in collaboration with the local Civic Societies and Town Councils and Grantham Charter Trustees	Agenda item requested by the Committee Chairman during 13 June 2023 meeting	Healthy and Strong Communities
LeisureSK Limited Management Fee request for 2024/2025	To consider the level of management fee required by LeisureSK Ltd for the next financial year Nicola McCoy-Brown (Chairman of LeisureSK Limited)	To make a recommendation that an appropriate allocation is made in the Council's budget framework as part of Budget setting for financial year 2024/2025	Agenda item requested by the Chairman of LeisureSK Ltd and agreed by the Committee Chairman by email on 13 November 2023	Healthy and Strong Communities
Mid-year KPI Performance Monitoring	To build upon historical reports to provide an update on performance to the mid-year point	To track progress in delivering the priorities set out in the Corporate Plan	Standard agenda item	High Performing Council

REPORT TITLE	ISSUE	PURPOSE	ORIGINATED/COMMITTEE HISTORY DATE(S)	CORPORATE/PRIORITY
	Lead Officer: Debbie Roberts (Head of Corporate Projects, Performance and Climate Change)			
STEAM 2022 Report – Economic Impact of the Visitor Economy	<p>To provide an insight into the economic impact of the visitor economy in South Kesteven for 2022</p> <p>Lead Officer: Nicola McCoy-Brown (Director of Growth and Culture)</p>	To collectively develop an understanding of the wider visitor economy landscape to identify how the Council can support the short-term recovery of the sector, whilst maintaining long-term resilience amongst key stakeholders	Agenda item requested by the Committee Chairman following 13 June 2023 meeting	Growth and our economy
Grantham Heritage Action Zone	<p>To review and scrutinise success and progress of the Grantham High Street Heritage Action Zone scheme</p> <p>Lead Officer: Claire Saunders (High Street Heritage Action Zone Project Manager)</p>	To facilitate the ongoing regeneration of Grantham town centre	Grantham High Street Heritage Action Zone was last reviewed by the Culture and Visitor Economy Overview and Scrutiny Committee on 28 February 2023	Growth and our economy
Performance of Council funded Arts venues	<p>To review and scrutinise success and progress in relation to various aspects of the Council's arts venues. To include an update on the Arts Council Transitional Funding</p> <p>Lead Officer: Karen Whitfield (Assistant Director for Culture and Leisure)</p>	To help the Council make informed decisions and adjust strategies to improve results and achieve Corporate goals	Arts Service Transitional Funding was reviewed by Agenda item requested by the Culture and Visitor Economy Overview and Scrutiny Committee on 28 February 2023	Healthy and Strong Communities High Performing Council

REPORT TITLE	ISSUE	PURPOSE	ORIGINATED/COMMITTEE HISTORY DATE(S)	CORPORATE/ PRIORITY
9 January 2024, 10:00am				
Wyndham Park Tennis Courts	To ensure tennis court provision is available at Wyndham Park Lead Officer: Karen Whitfield (Assistant Director for Culture and Leisure)	To receive an update in relation to the refurbishment and use of the tennis courts in Wyndham Park	Agenda item requested by the Committee Chairman during 13 June 2023 meeting.	Healthy and Strong Communities
Strategic approach to Markets Update	A report to detail the outcome of the letter issued by the Chairman of the Culture and Leisure OSC to the Grantham Charter Trustees, alongside the Town Councils of Bourne and Stamford regarding partnering and engaging with the Council in a consultation and development process and ideas aimed at addressing the challenges the Council-run markets face. Lead Officer: Nicola McCoy-Brown (Director of Growth and Culture)	To identify a practical and strategic way forward to achieve the full value of council-operated markets and ensure they thrive	Agenda item linked to the discussion held during 5 September 2023 Culture and Leisure Overview and Scrutiny Committee	Growth and our economy Healthy and strong communities Clean and sustainable environment High performing Council
Leisure SK Ltd – Annual Business Plan	To understand the operational and financial challenges for the year ahead and acknowledge the wider benefits of the provision of leisure across South Kesteven Lead Officer: Karen Whitfield (Assistant Director for Culture and Leisure)	To present the company Business Plan for financial year 2024/2025	Since the cessation of the companies committee, the Culture and Leisure OSC is the best placed to consider the business plan	Healthy and Strong Communities
Cultural Strategy	Six monthly update on the refreshed Cultural Strategy for the District and accompanying Action Plan Lead Officer: Karen Whitfield (Assistant Director for Culture and Leisure)	To consider performance against the action plan, evaluate effectiveness against agreed targets and performance indicators and decide what further action or	Agenda item requested by the Committee Chairman during 13 June 2023 meeting	Healthy and Strong Communities High Performing Council

REPORT TITLE	ISSUE	PURPOSE	ORIGINATED/COMMITTEE HISTORY DATE(S)	CORPORATE/PRIORITY
		data gathering, if any, is needed		
26 March 2024, 2:00pm				
Performance of LeisureSK Ltd	<p>Six monthly update on the performance of LeisureSK Ltd</p> <p>Lead Officer: Michael Chester (Team Leader – Leisure, Parks and Open Spaces)</p>	To consider the performance of LeisureSK Ltd	LeisureSK Ltd Performance Report last reviewed by the Culture and Visitor Economy Overview and Scrutiny Committee on 5 September 2023	Healthy and Strong Communities
Sport and Physical Activity Strategy Action Plan six-monthly update	<p>To review and scrutinise progress on the Sports and Physical Activity Strategy Action Plan.</p> <p>Lead Officer: Karen Whitfield (Assistant Director for Culture and Leisure)</p>	To assess performance on how the Council, together with partners, is delivering improvements in the provision and participation levels of sport and physical activity across the District	Sport and Physical Activity Strategy Action Plan six-monthly update last reviewed by Culture and Visitor Economy Overview and Scrutiny Committee on 2	Healthy and Strong Communities
FUTURE ITEMS				
Develop meaningful performance measures, indicators and metrics	<p>To preview priorities and outcomes specific to the Scrutiny Committees area of council business</p> <p>Lead Officer: Debbie Roberts (Head of Corporate Projects, Performance and Climate Change)</p>	To consider the proposals for KPIs to measure performance and achievement of the plans aims		High Performing Council
South Kesteven Tourism Data from STEAM 2023	Presentation of the STEAM (Scarborough Tourism Economic Activity Monitor) data	To track data used from four key visitor types which provide a significant amount of information that traces	Steam – Economic Impact last reported to Culture and Visitor Economy Overview and	Growth and our economy

REPORT TITLE	ISSUE	PURPOSE	ORIGINATED/COMMITTEE HISTORY DATE(S)	CORPORATE/PRIORITY
	Lead Officer: Nicola McCoy-Brown (Director of Growth and Culture)	visitor behaviours, spend, stay patterns and impact of sub-sectors	Scrutiny Committee on 6 September 2022	

REMIT

The remit of the Culture and Leisure Overview and Scrutiny Committee will be to work alongside Cabinet Members to assist with the development of policy and to scrutinise decisions in respect of, yet not limited to:

- Arts and Culture
- Heritage
- Markets and fairs
- Sport and physical activity
- Leisure SK Ltd
- Visitor Economy

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