

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.

Economic Impact - Indexed - Total



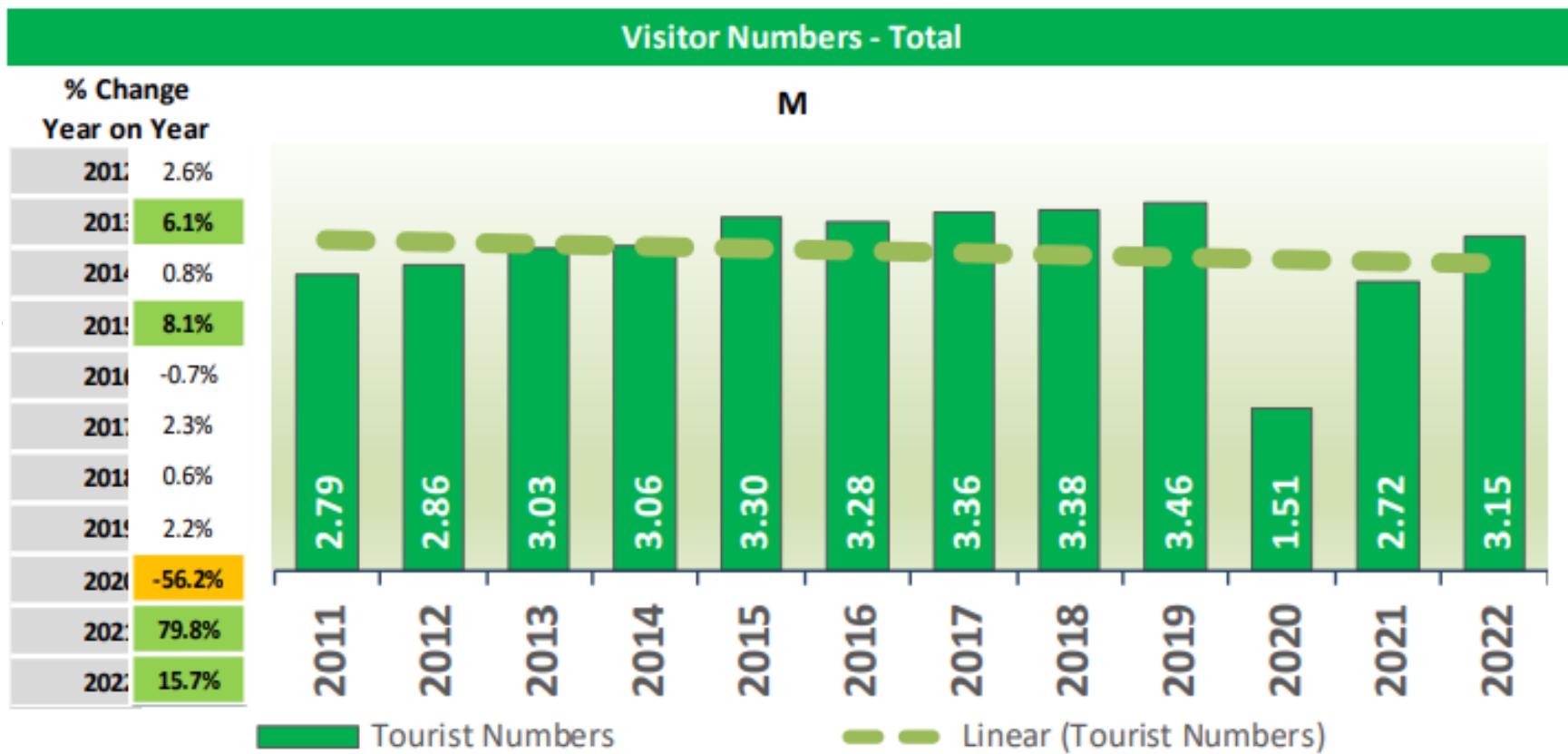


Figure 2 - Visitor Numbers - South Kesteven 2011-2022, Source: STEAM Report 2022 page 47

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
	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
Staying: Serviced	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
	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
Staying: Non-serviced	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