Melton Borough Council

STEAM Tourism Economic Impacts
2014-15 Review
Summary

Melton Borough Council

A Vibrant Tourism Destination

This is a summary of the STEAM tourism economic impact research undertaken for Melton Borough Council by Global Tourism Solutions (UK) Ltd.

2015

Melton saw **1.7 million Tourism Visits**

Visitors **staying** as part of a holiday or short break, accounted for **176 thousand visits** and **421 thousand nights** in local accommodation

1.9 million Visitor Days and Nights generated by visitors

A total of **£85.4 million** was generated within the local economy through visitor and tourism business expenditure

1.5 million tourism visits made by **Day Visitors**

1

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Day Visits generated **£53.4 million** for the local economy

On average, visitors **staying in Melton** spend 2.4 nights and spend **£7.8 million** on local accommodation

Visitors to Melton help support nearly **12 hundred full time equivalent jobs**

In total, **staying visitors** generate a **total economic impact** of **£32 million** for the businesses and communities in the Borough

Trends 2014-15

Economic Impact +6%

Visitor Numbers +5.8%

Total Visitor Days and Nights +5.7%

2015

Visitor Types

Staying Visitors encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

Day Visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

Total Visitor Numbers

1.696m

% Change 2014>2015

+5.8%

Net Change 2013>2015

+96,000 Visits

Visitor Numbers

Melton saw just under 1.7 million tourism visits during 2015. There has been growth of 5.8% in visitor numbers since 2014 and in the past three years (since 2012), visitor numbers have grown by 12%.

Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015 (Millions)	**M**	**0.088**	**0.010**	**0.078**	**0.176**	**1.520**	**1.696**
2014 (Millions)	M	0.091	0.009	0.077	0.176	1.426	1.603
Change 14/15 (%)	**%**	**-3.1**	**+18.0**	**+0.9**	**-0.3**	**+6.6**	**+5.8**
Share of Total (%)	%	5.2	0.6	4.6	10.4	89.6	100.0

Melton's 1.52 million tourism day visits in 2015 were the driving force behind the overall positive trend in visits to the Borough, with day visits up 6.6% between 2014 and 2015. Over the period 2014 to 2015, the Borough has seen growth of 94 thousand day visits, with consequential growth in local economic benefits such as increased visitor income and employment. Since 2012, Melton has seen an increase of 178 thousand day visits (+13.3%).

Staying visits were almost unchanged between 2014 and 2015 (-0.3%). Since 2012, however, visits have shown modest growth of +1.6%. Although growth in visits has been modest, the number of days and nights spent in local accommodation are up by a more significant margin - largely driven by a growth in the non-serviced accommodation sector (attracting longer stays, generally). The accommodation sector in Melton is relatively small, but although staying visitors account for only 10.4% of visits, they account for 21.7% of days and nights spent by tourists in Melton and 37.5% of the total economic benefit generated by tourism trips to the Borough.

Total Visitor Days

1.941m

% Change 2014>2015

+5.7%

Net Change 2014>2015

+105,000 Visitor Days

Visitor Days

The 1.696m visits to Melton during 2015 generated a total of 1.941 million (visitor) days spent in the area by staying visitors and day visitors.

Key Figures: Visitor Days

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015 (Millions)	**M**	**0.170**	**0.066**	**0.185**	**0.421**	**1.520**	**1.941**
2014 (Millions)	M	0.170	0.056	0.183	0.410	1.426	1.836
Change 14/15 (%)	**%**	**-0.2**	**+17.5**	**+1.0**	**+2.7**	**+6.6**	**+5.7**
Share of Total (%)	%	8.8	3.4	9.5	21.7	78.3	100.0

In 2015, 78.3% of the visitor days spent in Melton were associated with day visits. Day visitor days were up 6.6% compared to 2014. The Borough's busy events calendar contributed to the growth in day visits between 2014 and 2015, helping to spread the benefit of tourism day visits across the year – in 2015 day visitor days were spread almost equally between all four quarters of the year.

Melton's staying visitor market accounts for 421 thousand visitor days / nights, 21.7% of the total. Staying visitor days were up 2.7% between 2014 and 2015 and had grown by 11.6% between 2012 and 2015, with peak accommodation supply increasing by more than 300 beds during that period (+35%). The ***non-serviced accommodation*** sector generated an additional 17.5% bednights in 2015, compared to 2014, arising from a combination of increased capacity and positive performance. The performance of the ***serviced accommodation*** sector remained largely unchanged from 2014 levels (-0.2%)

Average Length of Stay in Days for Different Visitor Types – 2015

Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	Staying Visitors	Non-Serviced Accommodation
1	1.1	1.9	2.4	2.4	6.6

Total Economic Impact

£85.37m

% Change 2014>2015

+6.0%

Net Change 2014>2015

+£4.8m

Visitor Expenditure and Total Economic Impact

Tourism visits were estimated to have generated £85.37 million for the local economy in 2015, a change of +6% compared to 2014 and up 20.7% on 2012. This figure comprises *direct expenditure* of visitors on goods and services (£64.38 million) and the subsequent indirect / induced economic effects arising within the local economy (£20.99 million).

Distribution of Economic Effects

2015	Direct Visitor Expenditure						Indirect and Induced	Total Economic Impact
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	£7.786m	£17.52m	£7.309m	£23.33m	£8.435m	**£64.38m**	£20.99m	**£85.37m**

Note: m = million

Key Figures: Economic Impact

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015 (£ Millions)	**£M**	**19.806**	**3.610**	**8.576**	**31.992**	**53.37**	**85.366**
2014 (£ Millions)	£M	19.709	2.896	8.400	31.004	49.530	80.535
Change 14/15 (%)	**%**	**+0.5**	**+24.7**	**+2.1**	**+3.2**	**+7.8**	**+6.0**
Share of Total (%)	%	23.2	4.2	10.0	37.5	62.5	100.0

The Day Visitor market contributes £53.37 million of economic benefit for the local economy (62.5% of the total) – this figure is 7.8% higher than in 2014. Staying Visitors contribute a further £32 million to the local economy, 3.2% higher than in 2014.

Average Economic Impact Generated by Each Type of Visitor – 2015

Economic Impact	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£ 116.63**	**£ 54.80**	**£ 46.36**	**£ 76.04**	**£ 35.11**	**£ 43.99**
Economic Impact per Visit	£ 224.95	£ 359.68	£ 110.19	£ 181.86	£ 35.11	£ 50.33

Total Employment Supported

1,165 FTEs

% Change 2013>2015

+2.9%

Net Change 2013>2015

+33 FTEs

Employment Supported by Tourism

Tourism visits to Melton were estimated to have supported 1,165 Full-Time Equivalents (FTEs) in 2015. 80% of these FTEs (932) are assumed to have been generated directly, through the expenditure of visitors (Direct Employment), with the remaining 20% being indirect and induced (233), that is supported through the supply chain and further rounds of expenditure within the economy including employee spend. Since 2014, total employment (supported by tourism) has increased by 2.9%, and since 2012, tourism employment has grown by 7.3%.

Distribution of Employment

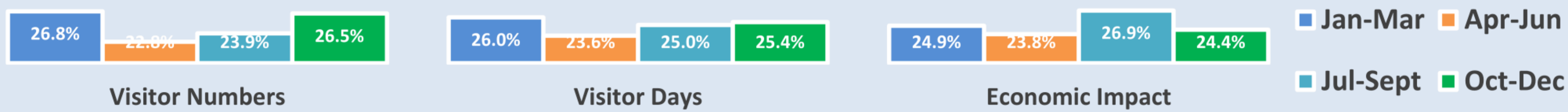
2015	Direct Employment						Indirect and Induced	Total Employment
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	194	251	127	305	54	**932**	233	**1,165**

Key Figures: Employment Supported

Employment Supported		Direct Employment						Indirect and Induced	Total
		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	Total Direct		
2015 (FTEs)	**FTE**	**288**	**50**	**83**	**422**	**510**	**932**	**233**	**1,165**
2014 (FTEs)	FTE	291	48	83	423	485	908	224	1,132
Change 14/15 (%)	**%**	**-1.1**	**+5.2**	**-0.3**	**-0.3**	**+5.2**	**+2.7**	**+3.9**	**+2.9**
Share of Total (%)	%	24.7	4.3	7.1	36.2	43.8	80.0	20.0	100.0

The ***day visitor*** market is estimated to support 510 FTEs directly, with a further 422 FTEs directly supported by ***staying visitors***.

Distribution of Key Impacts by Quarter – 2015



STEAM FINAL TREND REPORT FOR 2009-2015

MELTON BOROUGH COUNCIL

Comparing 2015 and 2014

All £'s Historic Prices

COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2015 & 2014 - IN HISTORIC PRICES

KEY

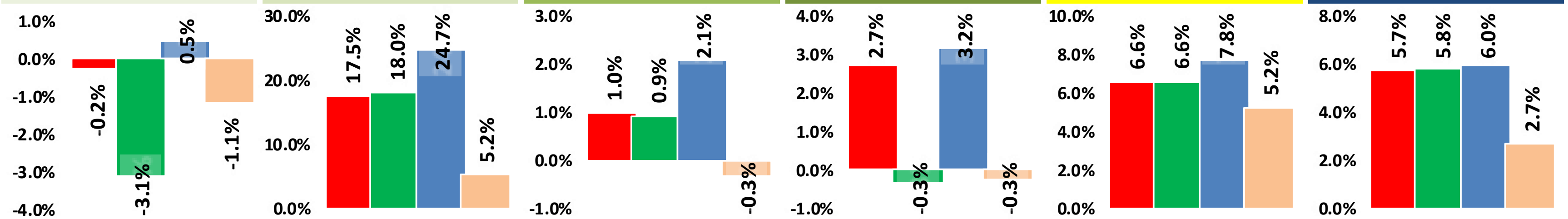
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %
Visitor Days	M	0.170	0.170	-0.2%	0.066	0.056	17.5%	0.185	0.183	1.0%	0.421	0.410	2.7%	1.520	1.426	6.6%	1.941	1.836	5.7%
Visitor Numbers	M	0.088	0.091	-3.1%	0.010	0.009	18.0%	0.078	0.077	0.9%	0.176	0.176	-0.3%	1.520	1.426	6.6%	1.696	1.603	5.8%
Direct Expenditure	£M																64.38	60.82	5.9%
Economic Impact	£M	19.81	19.71	0.5%	3.610	2.896	24.7%	8.576	8.400	2.1%	31.99	31.00	3.2%	53.37	49.53	7.8%	85.37	80.53	6.0%
Direct Employment	FTEs	288	291	-1.1%	50	48	5.2%	83	83	-0.3%	422	423	-0.3%	510	485	5.2%	932	908	2.7%
Total Employment	FTEs																1,165	1,132	2.9%

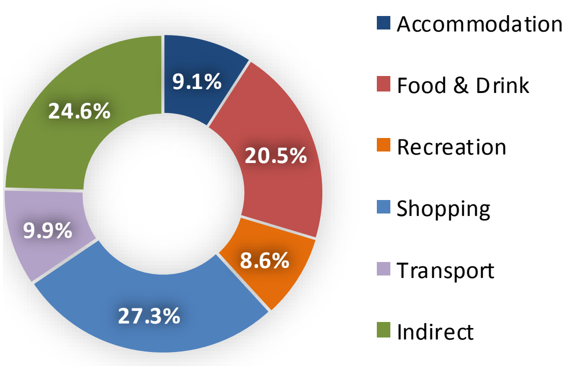
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2015 & 2014 - IN HISTORIC PRICES

KEY

- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

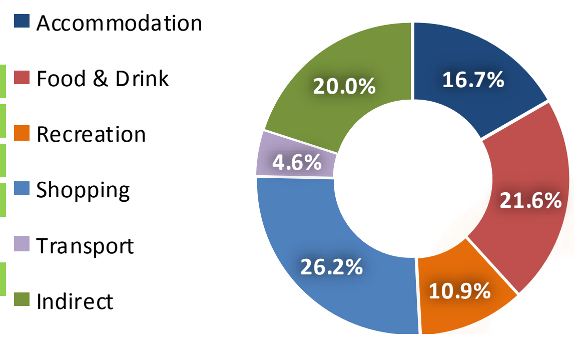


Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Sectoral Distribution of Employment - FTEs

Sectors	Economic Impact 2015	Economic Impact 2014	+/- %	Employment 2015	Employment 2014	+/- %
Accommodation	7.786	7.554	3.1%	194	196	-1.0%
Food & Drink	17.52	16.53	6.0%	251	243	3.5%
Recreation	7.309	6.908	5.8%	127	123	3.3%
Shopping	23.33	21.92	6.5%	305	293	4.0%
Transport	8.435	7.911	6.6%	54	52	4.1%
TOTAL DIRECT	**64.38**	**60.82**	**5.9%**	**932**	**908**	**2.7%**
Indirect	20.99	19.72	6.4%	233	224	3.9%
TOTAL	**85.37**	**80.53**	**6.0%**	**1,165**	**1,132**	**2.9%**



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