

The Visitor Economy of City of Doncaster

This is a summary of the annual tourism economic impact research undertaken for City of Doncaster Council for the calendar years 2022-2024. Outputs in this report have been generated using the Scarborough Tourism Economic Activity Model (STEAM), owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19

Estimated tourism figures throughout all of the UK appear to have mostly returned to, or surpassed, pre-Covid 19 estimates for the first time.

2024

9.65 million
tourism visits to Doncaster in
2024

.865 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **2.0 million nights** in local accommodation

10.8 million
Visitor Days and
Nights generated by
Visitors in **2024**

On average, visitors **staying in the area** spend **2.4** nights in the area and spend a total of **£43.2 million** on local accommodation

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

Day Visits to
Doncaster
generated
£800 million
for the local
economy in
2024

In total, **staying**
visitors generate
a **total economic**
impact of
£154 million for
local businesses and
communities

Visitor
activity and
spend
supports
more than
8,380 full
time
equivalent
jobs locally

A total of **£953.5 million** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Trends
2023-2024

Economic Impact +10.4%

Visitor Numbers +4.9%

Total Visitor Days and Nights +4.9%

2024

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

Staying Visitors

9% of Visits

Day Visitors

91% of Visits

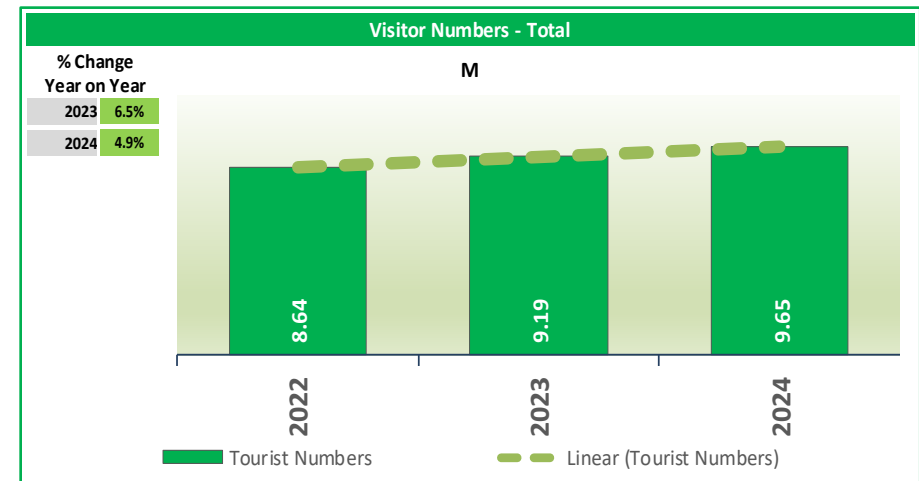
**Total
Visitor
Numbers
9.65m**

Visitor Numbers

There were an estimated 9.65m tourism visits to Doncaster in 2024, up by 4.9% from the previous year, and up by 11.7% from estimated levels reported in 2022, mainly due to visitors staying in non-serviced accommodation and day visitor numbers.

In 2024, .865m visitors stayed in some sort of accommodation within the area. This sector saw an increase of 1.3% when compared to the previous year and is now 1.2% above 2022 levels. While stable, there are differences within the sectors. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a slight decrease of

-2.9% over the last year and is -4.6% below 2022 levels. In contrast, the smaller non-serviced accommodation sector was up 40.2% on the previous year and is 44.7% above 2022 estimates. Day visitors throughout many locations in the UK are just returning to pre-covid levels, especially in rural and semi-rural locations, so it is encouraging to see that day visitors were up by 5.3% on the previous year, and are now 12.8% above 2022 estimates, which has had a positive knock-on effect on total visitor numbers as at 91%, day visitors represent a very high percentage of all visitor numbers to Doncaster.



Key Figures: Visitor Numbers 2024

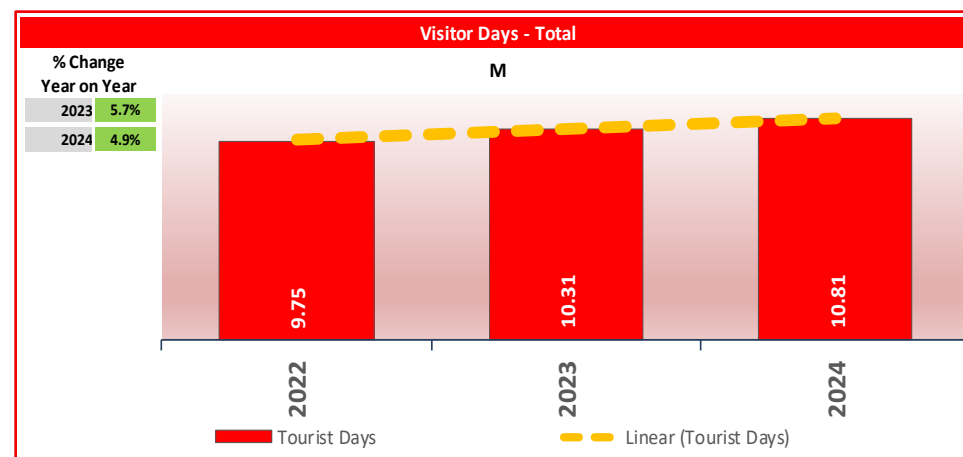
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.324	0.056	0.485	0.865	8.780	9.645
2023 (Millions)	M	0.333	0.040	0.480	0.854	8.341	9.195
Change 23/24 (%)	%	-2.9	+40.2	+1.0	+1.3	+5.3	+4.9
Share of Total (%)	%	3.4	0.6	5.0	9.0	91.0	100.0

**Total
Visitor
Days
10.8m**

Visitor Days

Visitors spent an estimated 10.8m days in Doncaster during 2024. Visitor days take into account multiple stays. For example, if a family of five stay three nights, they will not only account for five visitors, but also fifteen visitor days. On average, staying visitors to the area stay 2.4 days.

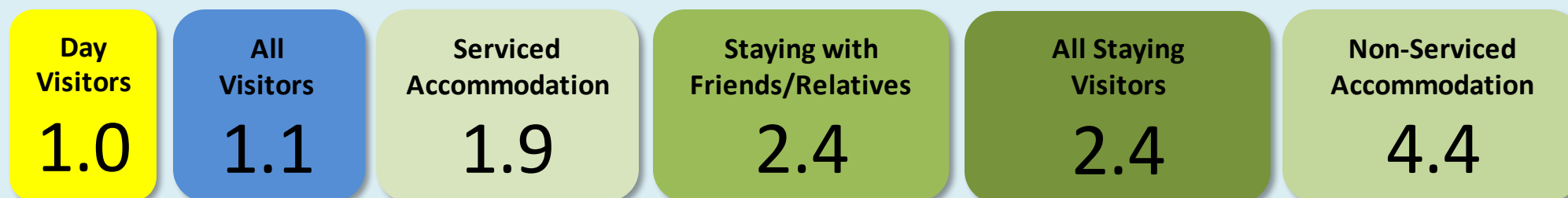
Total staying visitors accounted for 2.03m visitor days in 2024, an increase of 3.3% on the previous year, and coincidentally, a 3.3% increase above 2022 levels. The serviced accommodation sector decreased slightly by -2.9% when compared to 2023, and is -5.0% below figures reported in 2022. In contrast, the smaller non-serviced accommodation sector is up 40.3% on the previous year, and is now well above 2022 levels by 45.2%, which points to the non-serviced sector recovering from the covid downturn ahead the serviced sector, in part due to an increase in short term let establishments and bedspaces over the past years. As mentioned before, day visitors to the area are up by 5.3% on the previous year, a good result when compared to other areas, and especially given the heavy predominance of the day visitor sector to Doncaster.



Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.623	0.248	1.163	2.033	8.780	10.813
2023 (Millions)	M	0.641	0.177	1.151	1.969	8.341	10.310
Change 23/24 (%)	%	-2.9	+40.3	+1.0	+3.3	+5.3	+4.9
Share of Total (%)	%	5.8	2.3	10.8	18.8	81.2	100.0

Average Length of Stay for Different Visitor Types: 2024



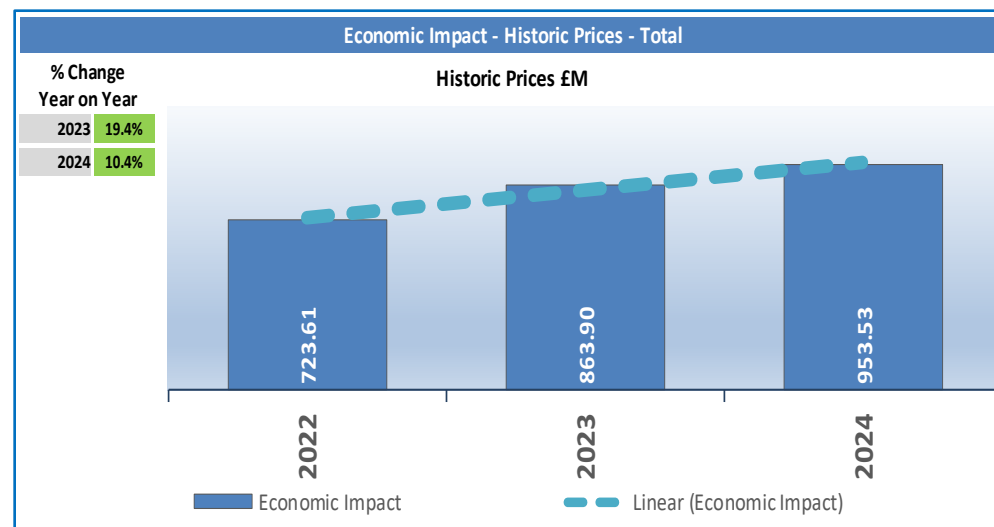
**Total
Economic
Impact
£953.5m**

Economic Impact

The value of tourism activity in Doncaster was estimated to be £953.5m in 2024, up by 10.4% on the previous year, and up by 10.8% (indexed for inflation) when compared to 2022 levels.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £635.7m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £317.8m, together totalling

£953.5m. The largest visitor spending sector by far was Shopping (£272m), followed by Food & Drink (£175m), then Transport (£92m) followed by Recreation (£53m). The economic impact of the serviced sector was down fractionally by -0.8% on the previous year. The smaller non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up significantly by 61.2% on 2023, again, partly due to more establishments over the past few years. In terms of comparison, the serviced sector has about 25% more bedspaces than the non-serviced sector and has over 40% the economic impact. Day visitor economic impact is up 10.5% on the previous year, and is 12.9% above 2022 levels when indexed for inflation; its economic impact is around ten times that of All Staying Visitors.



Accommodation: Payments for overnight stays in accommodation, such as room rates, pitch fees and hire charges for non-serviced accommodation

Recreation: Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions attendance as well as sports participation and spectating.

Transport: Expenditure within the destination on travel, including fuel and public transport tickets

Food and Drink: Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries

Shopping: What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items

Indirect: The expenditure by local tourism businesses within the local supply chain

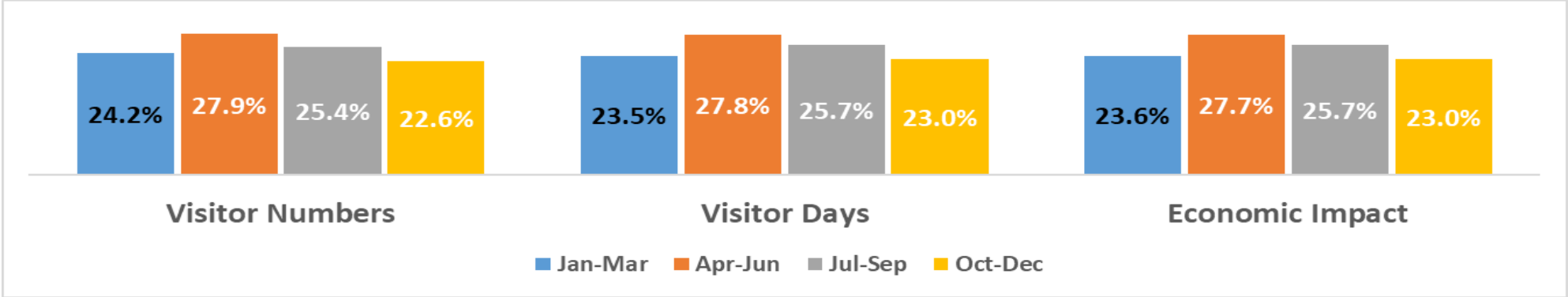
Key Figures: Economic Impact 2024 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Millions)	£M	81.314	32.311	40.097	153.721	799.805	953.527
2023 (£ Millions)	£M	81.937	20.040	37.829	139.807	724.092	863.899
Change 23/24 (%)	%	-0.8	+61.2	+6.0	+10.0	+10.5	+10.4
Share of Total (%)	%	8.5	3.4	4.2	16.1	83.9	100.0

Average Economic Impact Generated by Each Type of Visitor: 2024

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£ 130.57	£ 130.43	£ 34.49	£ 75.61	£ 91.09	£ 88.18
Economic Impact per Visit	£ 251.23	£ 573.99	£ 82.64	£ 177.68	£ 91.09	£ 98.86

Seasonal Distribution of Key Visitor Metrics: 2024



Total
FTEs
Supported
8,380

Employment Supported by Tourism

The expenditure and activity of visitors to Doncaster supported a total of 8,380 Full-Time Equivalent jobs (FTEs) in 2024; a slight increase of 3.7% on the year before, but 17.1% above 2022 levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 5,862 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 2,518 FTEs. The Shopping sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 2,536 FTEs, followed by Food & Drink at 1,791 FTEs, then Recreation at 657 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2024

Employment Supported by Sector 2024	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	457	1,791	657	2,536	421	5,862	2,518	8,380

STEAM Comparative Headlines: 2023 and 2024 (Unindexed)

STEAM REPORT FOR 2022-2024 - FINAL

CITY OF DONCASTER COUNCIL

Comparing 2024 and 2023

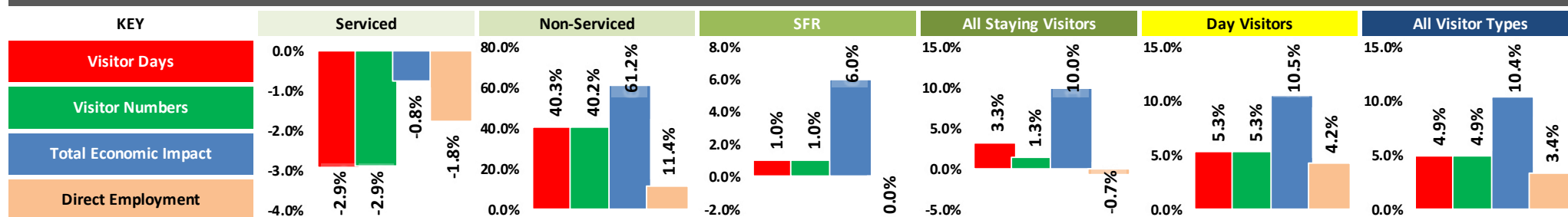
All £'s Historic Prices

COMPARATIVE HEADLINES

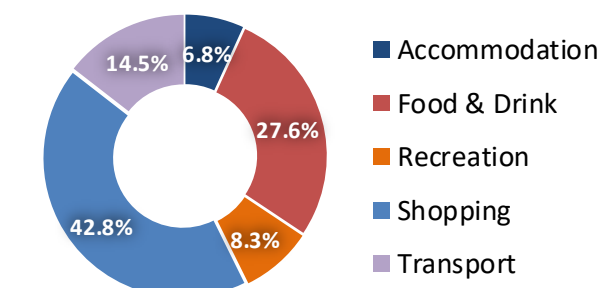
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - IN HISTORIC PRICES

KEY																		
	Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced														
	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %
Visitor Days M	0.623	0.641	-2.9%	0.25	0.18	40.3%	1.16	1.15	1.0%	2.03	1.97	3.3%	8.78	8.34	5.3%	10.81	10.31	4.9%
Visitor Numbers M	0.324	0.333	-2.9%	0.06	0.04	40.2%	0.49	0.48	1.0%	0.87	0.85	1.3%	8.78	8.34	5.3%	9.65	9.19	4.9%
Direct Expenditure £M																635.73	577.46	10.1%
Economic Impact £M	81.31	81.94	-0.8%	32.31	20.04	61.2%	40.10	37.83	6.0%	153.72	139.81	10.0%	799.81	724.09	10.5%	953.53	863.90	10.4%
Direct Employment FTEs	672	684	-1.8%	53	48	11.4%	256	256	0.0%	981	988	-0.7%	4,881	4,684	4.2%	5,862	5,672	3.4%
Total Employment FTEs																8,380	8,078	3.7%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - IN HISTORIC PRICES



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



Direct Expenditure Categories

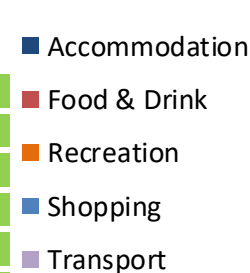
2024	2023	+/- %
43.17	38.19	13.0%
175.27	159.53	9.9%
52.99	48.52	9.2%
272.19	247.44	10.0%
92.12	83.79	9.9%
635.73	577.46	10.1%
317.80	286.44	10.9%
953.53	863.90	10.4%

Sectors

Accommodation
Food & Drink
Recreation
Shopping
Transport
TOTAL DIRECT
Indirect
TOTAL

TOTAL

Sectoral Distribution of Employment - FTEs



Direct Employment Categories

STEAM Comparative Headlines: 2022 and 2024 (Indexed for inflation)

STEAM REPORT FOR 2022-2024 - FINAL

CITY OF DONCASTER COUNCIL

Comparing 2024 and 2022

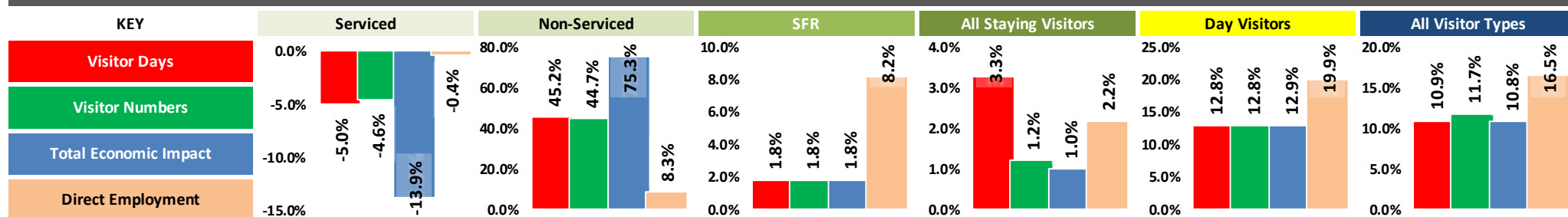
2022 in 2024 prices (1.19)

COMPARATIVE HEADLINES

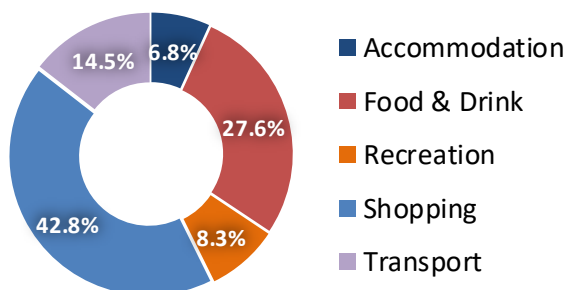
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2022 - INDEXED TO 2024

KEY																		
	Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced														
	2024	2022	+/- %	2024	2022	+/- %	2024	2022	+/- %	2024	2022	+/- %	2024	2022	+/- %	2024	2022	+/- %
Visitor Days M	0.623	0.656	-5.0%	0.25	0.17	45.2%	1.16	1.14	1.8%	2.03	1.97	3.3%	8.78	7.78	12.8%	10.81	9.75	10.9%
Visitor Numbers M	0.324	0.339	-4.6%	0.06	0.04	44.7%	0.49	0.48	1.8%	0.87	0.85	1.2%	8.78	7.78	12.8%	9.65	8.64	11.7%
Direct Expenditure £M																635.73	575.92	10.4%
Economic Impact £M	81.31	94.40	-13.9%	32.31	18.43	75.3%	40.10	39.39	1.8%	153.72	152.22	1.0%	799.81	708.73	12.9%	953.53	860.95	10.8%
Direct Employment FTEs	672	675	-0.4%	53	49	8.3%	256	236	8.2%	981	961	2.2%	4,881	4,070	19.9%	5,862	5,031	16.5%
Total Employment FTEs																8,380	7,156	17.1%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2022 - INDEXED TO 2024



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2024



Direct Expenditure Categories

	2024	2022	+/- %
Accommodation	43.17	43.65	-1.1%
Food & Drink	175.27	157.50	11.3%
Recreation	52.99	48.34	9.6%
Shopping	272.19	243.70	11.7%
Transport	92.12	82.72	11.4%
TOTAL DIRECT	635.73	575.92	10.4%
Indirect	317.80	285.03	11.5%
TOTAL	953.53	860.95	10.8%

Sectors

	2024	2022	+/- %
Accommodation	457	460	-0.5%
Food & Drink	1,791	1,515	18.2%
Recreation	657	564	16.5%
Shopping	2,536	2,137	18.7%
Transport	421	355	18.3%
TOTAL DIRECT	5,862	5,031	16.5%
Indirect	2,518	2,125	18.5%
TOTAL	8,380	7,156	17.1%

Sectoral Distribution of Employment - FTEs



Direct Employment Categories