Sheffield City Council

STEAM Tourism Economic Impacts 2024 Year in Review Summary

The Visitor Economy of Sheffield City

This is a summary of the annual tourism economic impact research undertaken for Sheffield City Council for the calendar years 2015-2024. 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

17.4 million tourism visits to **Sheffield** in **2024**

1.98 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **4.7 million nights** in local accommodation

20.1 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 **£153 million** on local accommodation

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

Day Visits to Sheffield generated **£1.4 billion** for the local economy in **2024**

In total, **staying visitors** generate a **total economic impact** of **£445 million** for local businesses and communities

Visitor activity and spend supports more than **15,806 full time equivalent jobs** locally

A total of **£1.85 billion** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Trends 2023-2024

- **Economic Impact +10%**
- **Visitor Numbers +4.8%**
- **Total Visitor Days and Nights +5.0%**

2024	**Visitor Types**

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
11% of Visits

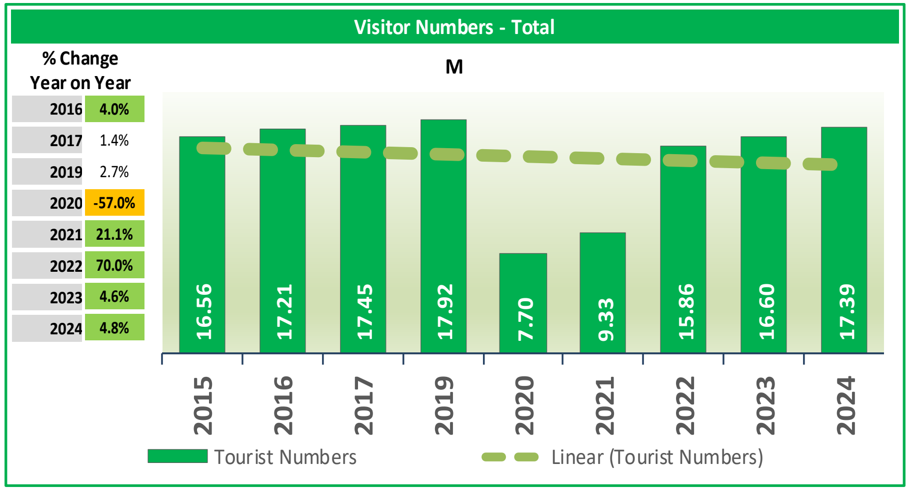
Day Visitors
89% of Visits

Total Visitor Numbers
17.4m

Visitor Numbers

There were an estimated 17.4m tourism visits to Sheffield in 2024, up by 4.8% from the previous year, but still slightly down by -3% from estimated pre-covid levels reported in 2019, mainly due to day visitor numbers.

In 2024, 1.98m visitors stayed in some sort of accommodation within the area. This sector saw an increase of 2.9% when compared to the previous year and is now 9.9% above pre-covid levels. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a fractional decrease of -0.2% over the last year but is now above 2019 pre-covid levels. In contrast, the smaller non-serviced accommodation sector was up 34% on the previous year and is now well above pre-covid 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% on the previous year, although they are still slightly below pre-covid estimates by -4.4%, which has had a knock-on effect on total visitor numbers as a whole, as day visitors represent 89% of all visitor numbers to Sheffield.



Key Figures: Visitor Numbers 2024

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	**M**	**0.909**	**0.183**	**0.885**	**1.977**	**15.410**	**17.387**
2023 (Millions)	M	0.910	0.137	0.875	1.922	14.674	16.596
Change 23/24 (%)	**%**	**-0.2**	**+34.1**	**+1.2**	**+2.9**	**+5.0**	**+4.8**
Share of Total (%)	%	5.2	1.1	5.1	11.4	88.6	100.0

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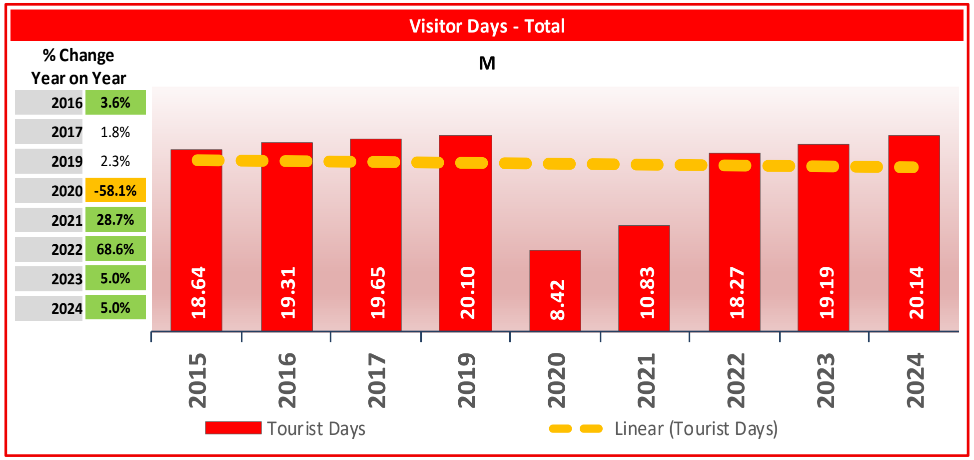
Total Visitor Days

20.1m

Visitor Days

Visitors spent an estimated 20.1m days in Sheffield 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 4.7m visitor days in 2024, an increase of 4.8% on the previous year, and 19% above 2019 pre-covid levels. The serviced accommodation sector decreased fractionally by -0.7% when compared to 2023, but it is now 4% above pre-covid figures reported in 2019. In contrast, the small non-serviced accommodation sector is up 34% on the previous year, and is now well above pre-covid 2019 levels, which points to the non-serviced sector recovering well ahead the serviced sector, in part due to a large increase in establishments and bedspaces over the past years. As mentioned before, day visitors to the area are up by 5% on the previous year, a good result when compared to other areas, and especially given the predominance of the day visitor sector to Sheffield.



Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	**M**	**1.796**	**0.813**	**2.122**	**4.730**	**15.410**	**20.140**
2023 (Millions)	M	1.809	0.607	2.096	4.512	14.674	19.187
Change 23/24 (%)	**%**	**-0.7**	**+33.8**	**+1.2**	**+4.8**	**+5.0**	**+5.0**
Share of Total (%)	%	8.9	4.0	10.5	23.5	76.5	100.0

Average Length of Stay for Different Visitor Types: 2024

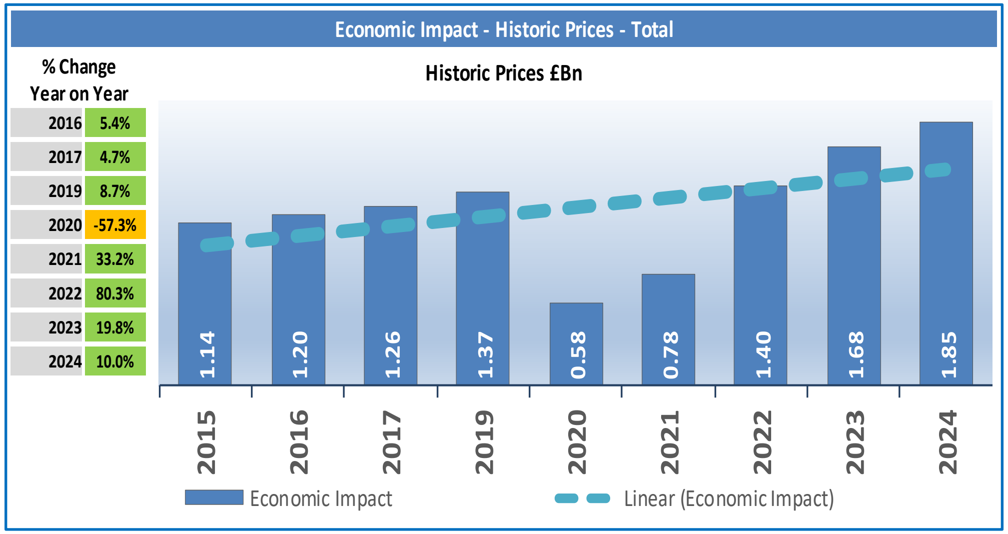
Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors	Non-Serviced Accommodation
1.0	1.2	2.0	2.4	2.4	4.4

Total Economic Impact

£1.85bn

Economic Impact

The value of tourism activity in Sheffield was estimated to be £1.85bn in 2024, up by 10% on the previous year, and up by 1.3% (indexed for inflation) when compared to pre-covid levels.



The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £1.24bn. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £606m, together totalling £1.85bn. The largest visitor spending sector was Shopping (£49m), followed by Food & Drink (£32m), then Transport (£17m) followed closely by Accommodation (£15m). The economic impact of the serviced sector was up slightly by 1.2% on the previous year. The smaller non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up significantly by 40% on 2023, again, partly due to more establishments over the past few years. In terms of comparison, the serviced sector has about 30% more bedspaces than the non-serviced sector and has well over twice the economic impact. Day visitor economic impact is up 10.2% on the previous year, and is now just -4.4% below pre-covid levels when indexed for inflation; its economic impact is over three 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

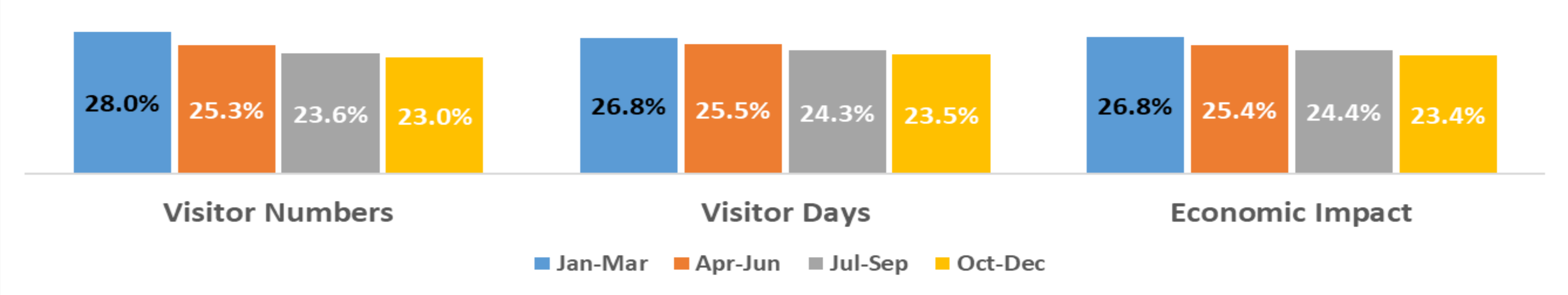
Key Figures: Economic Impact 2024 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Billions)	**£Bn**	**0.261**	**0.111**	**0.073**	**0.445**	**1.404**	**1.849**
2023 (£ Billions)	£Bn	0.258	0.079	0.069	0.406	1.274	1.680
Change 23/24 (%)	**%**	**+1.2**	**+40.0**	**+6.2**	**+9.6**	**+10.2**	**+10.0**
Share of Total (%)	%	14.1	6.0	4.0	24.1	75.9	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	**£ 145.42**	**£ 136.23**	**£ 34.49**	**£ 94.08**	**£ 91.09**	**£ 91.80**
Economic Impact per Visit	£ 287.44	£ 603.65	£ 82.64	£ 225.07	£ 91.09	£ 106.33

Seasonal Distribution of Key Visitor Metrics: 2024



Total FTEs Supported

15,806

Employment Supported by Tourism

The expenditure and activity of visitors to Sheffield supported a total of 15,806 Full-Time Equivalent jobs (FTEs) in 2024; a slight increase of 3.6% on the year before, and 4.8% above 2019 pre-covid levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 11,004 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 4,803 FTEs. The Shopping sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 4,590 FTEs, followed by Food & Drink at 3,306 FTEs, then Recreation at 1,280 FTEs closely followed by Accommodation at 1,049 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	1,049	3,306	1,280	4,590	778	11,004	4,803	15,806

STEAM Comparative Headlines: 2023 and 2024 (Unindexed)

STEAM REPORT FOR 2015-2024 - DRAFT SHEFFIELD CITY COUNCIL	Comparing 2024 and 2023 2023 in 2024 prices (1.049)	COMPARATIVE HEADLINES

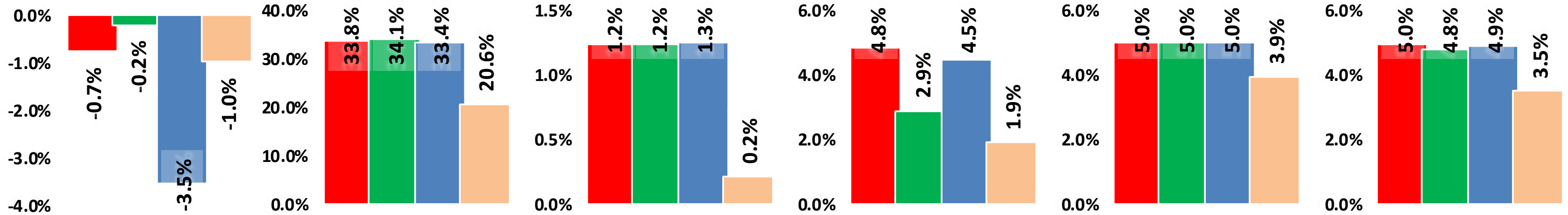
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - INDEXED TO 2024

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

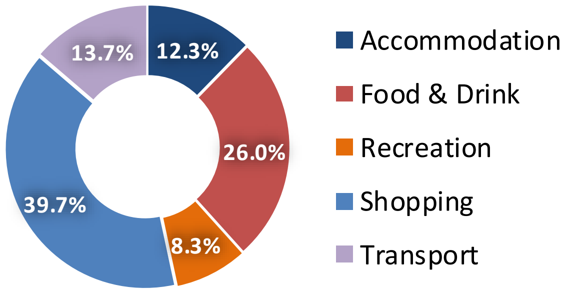
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %
Visitor Days	M	1.796	1.809	-0.7%	0.813	0.607	33.8%	2.122	2.096	1.2%	4.730	4.512	4.8%	15.41	14.67	5.0%	20.14	19.19	5.0%
Visitor Numbers	M	0.909	0.910	-0.2%	0.183	0.137	34.1%	0.885	0.875	1.2%	1.977	1.922	2.9%	15.41	14.67	5.0%	17.39	16.60	4.8%
Direct Expenditure	£Bn																1.243	1.184	4.9%
Economic Impact	£Bn	0.261	0.271	-3.5%	0.111	0.083	33.4%	0.073	0.072	1.3%	0.445	0.426	4.5%	1.404	1.336	5.0%	1.849	1.762	4.9%
Direct Employment	FTEs	1,617	1,633	-1.0%	354	293	20.6%	466	465	0.2%	2,438	2,392	1.9%	8,566	8,241	3.9%	11,004	10,633	3.5%
Total Employment	FTEs																15,806	15,263	3.6%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - INDEXED TO 2024

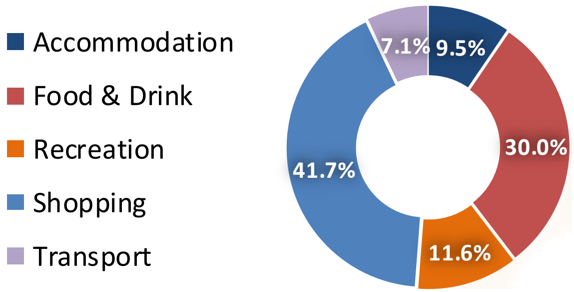
KEY
Visitor Days
Visitor Numbers
Total Economic Impact
Direct Employment



Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2024			Sectors	Sectoral Distribution of Employment - FTEs		
2024	2023	+/- %		2024	2023	+/- %
0.153	0.146	5.0%	Accommodation	1,049	1,046	0.3%
0.324	0.308	5.0%	Food & Drink	3,306	3,182	3.9%
0.103	0.098	4.9%	Recreation	1,280	1,233	3.8%
0.493	0.470	4.8%	Shopping	4,590	4,424	3.8%
0.170	0.162	5.3%	Transport	778	747	4.2%
1.243	**1.184**	4.9%	**TOTAL DIRECT**	**11,004**	**10,633**	3.5%
0.606	0.578	4.8%	Indirect	4,803	4,631	3.7%
1.849	**1.762**	4.9%	**TOTAL**	**15,806**	**15,263**	3.6%



Direct Expenditure Categories



Direct Employment Categories

STEAM Comparative Headlines: 2019 and 2024 Covid Recovery (Indexed for inflation)

STEAM REPORT FOR 2015-2024 - DRAFT
SHEFFIELD CITY COUNCIL

Comparing 2024 and 2019
2019 in 2024 prices (1.336)

COMPARATIVE HEADLINES

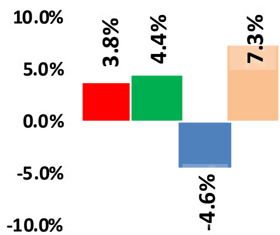
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2019 - INDEXED TO 2024

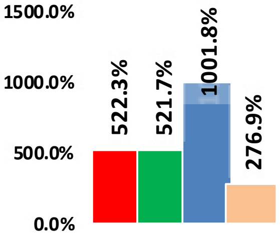
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

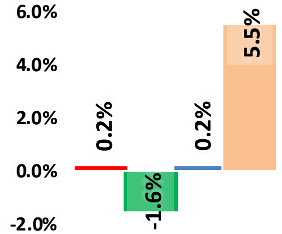
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %
Visitor Days	M	1.796	1.730	3.8%	0.813	0.131	522.3%	2.122	2.117	0.2%	4.730	3.978	18.9%	15.41	16.12	-4.4%	20.14	20.10	0.2%
Visitor Numbers	M	0.909	0.870	4.4%	0.183	0.030	521.7%	0.885	0.900	-1.6%	1.977	1.799	9.9%	15.41	16.12	-4.4%	17.39	17.92	-3.0%
Direct Expenditure	£Bn																1.243	1.225	1.5%
Economic Impact	£Bn	0.261	0.274	-4.6%	0.111	0.010	1001.8%	0.073	0.073	0.2%	0.445	0.357	24.7%	1.404	1.468	-4.4%	1.849	1.825	1.3%
Direct Employment	FTEs	1,617	1,508	7.3%	354	94	276.9%	466	442	5.5%	2,438	2,044	19.3%	8,566	8,513	0.6%	11,004	10,556	4.2%
Total Employment	FTEs																15,806	15,076	4.8%

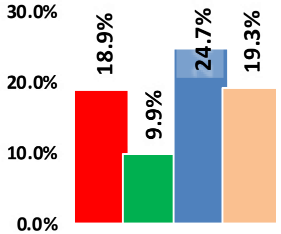
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2019 - INDEXED TO 2024

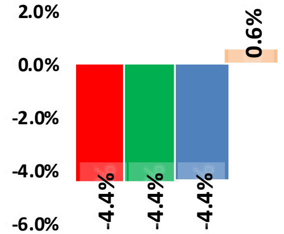
KEY
- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

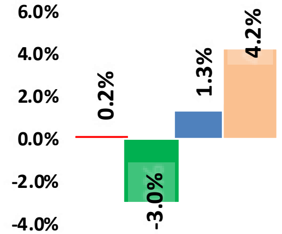
Serviced


Non-Serviced


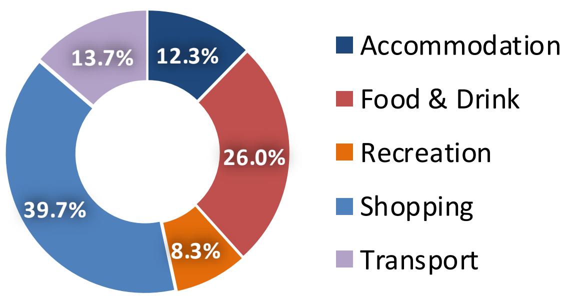
SFR


All Staying Visitors


Day Visitors


All Visitor Types


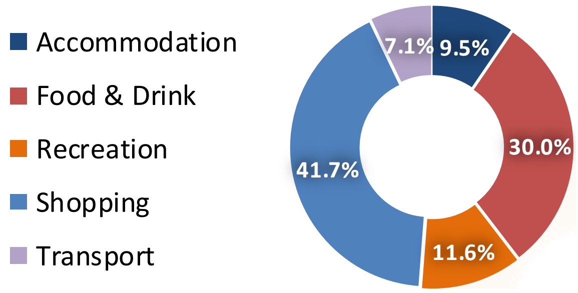
Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2024



Direct Expenditure Categories

Sectoral Distribution of Employment - FTEs

Economic Impact 2024	Economic Impact 2019	+/- %	Sectors	Employment 2024	Employment 2019	+/- %
0.153	0.114	33.6%	Accommodation	1,049	924	13.6%
0.324	0.329	-1.6%	Food & Drink	3,306	3,193	3.5%
0.103	0.102	1.2%	Recreation	1,280	1,202	6.5%
0.493	0.508	-2.9%	Shopping	4,590	4,492	2.2%
0.170	0.172	-0.9%	Transport	778	745	4.3%
1.243	**1.225**	1.5%	**TOTAL DIRECT**	**11,004**	**10,556**	4.2%
0.606	0.600	0.9%	Indirect	4,803	4,520	6.2%
1.849	**1.825**	1.3%	**TOTAL**	**15,806**	**15,076**	4.8%



Direct Employment Categories

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