South Yorkshire Local Visitor Economic Partnership

STEAM Tourism Economic Impacts 2025 Year in Review Summary

The Visitor Economy of the South Yorkshire Local Visitor Economic Partnership area

This is a summary of the annual tourism economic impact research undertaken for the South Yorkshire LVEP area for the calendar years 2022-2025. 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 in most visitor sectors have now surpassed pre-Covid 19 estimates.**

2025

38.3 million tourism visits to **South Yorkshire** in **2025**

3.9 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **9.3 million nights** in local accommodation

43.65 million Visitor Days and Nights generated by Visitors in **2025**

On average, visitors **staying in the area** spend **2.4** nights in the area and spend a total of **£239 million** on local accommodation

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

Day Visits to South Yorkshire generated **£3.2 billion** for the local economy in **2024**

In total, **staying visitors** generate a **total economic impact** of **£774 million** for local businesses and communities

Visitor activity and spend supports more than **32,788 full time equivalent jobs** locally

A total of **£4.0 billion** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Trends 2024-2025

Economic Impact +8.7%

Visitor Numbers +5.5%

Total Visitor Days and Nights +4.6%

2025

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
10% of Visits

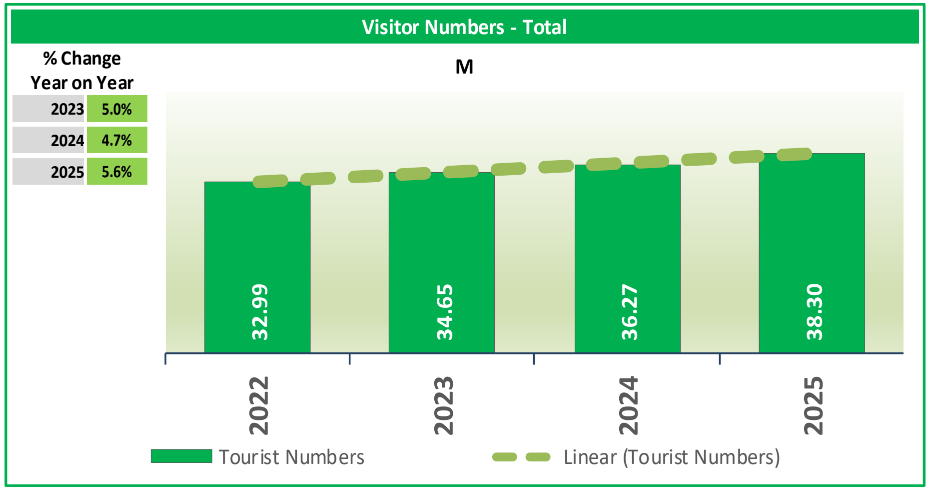
Day Visitors
90% of Visits

Total Visitor Numbers
38.3m

Visitor Numbers

There were an estimated 38.3m tourism visits to South Yorkshire in 2025, up by 5.5% from the previous year, and up by 16.1% from estimated 2022 visitor numbers, mainly due to increases in those staying in non-serviced accommodation and in day visitor numbers.

Between 2024 and 2025 visitor numbers rose in South Yorkshire, but not across the board. Visitor numbers were up in non-serviced accommodation (comprising self-catering options and some caravan, camping and touring sites) by 17.9% and within the Day Visitor sector by 6.4%. Visitor numbers within the serviced accommodation (primarily comprised of hotels, guest houses and B&Bs), dipped by -9.1% on the year before. This is a consistent pattern seen throughout the United Kingdom and one we attribute to the current economic climate. The serviced sector is still by far the dominant accommodation sector, with over five times more visitors than the non-serviced sector and twice the economic impact. Day visitor numbers are on the increase year-on-year, and this is both encouraging and important as they represent 90% of all visitors to the area, which is extremely high when compared to other areas within the UK.



Key Figures: Visitor Numbers 2025

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**1.386**	**0.328**	**2.210**	**3.924**	**34.353**	**38.276**
2024 (Millions)	M	1.524	0.278	2.173	3.976	32.295	36.270
Change 24/25 (%)	**%**	**-9.1**	**+17.9**	**+1.7**	**-1.3**	**+6.4**	**+5.5**
Share of Total (%)	%	3.6	0.9	5.8	10.3	89.7	100.0

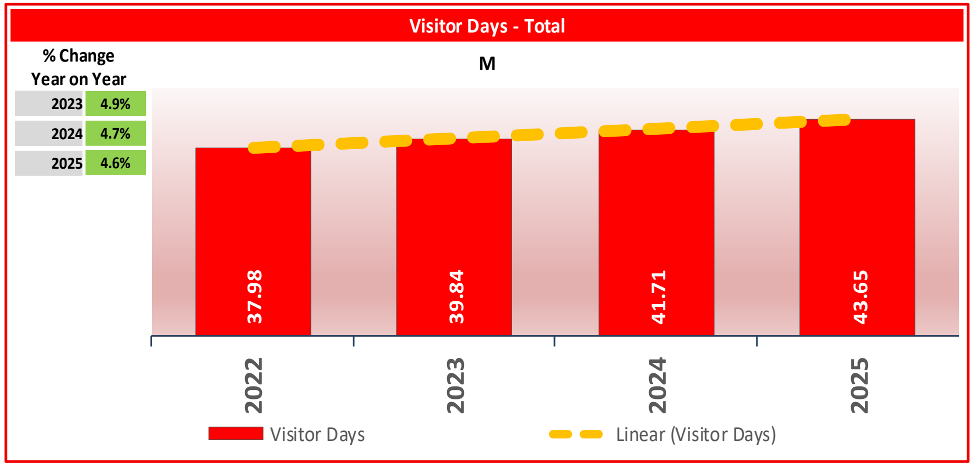
Total Visitor Days

43.65m

Visitor Days

Visitors spent an estimated 43.65m days in South Yorkshire during 2025. 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 visitor days were up 4.6% from the year before. But as we saw with visitor numbers, there are differences within the overall picture. The non-serviced accommodation sector saw an increase 8.2%; combined with a rise in visitor numbers, this means more visits were made to non-serviced accommodation and visitors stayed longer. Day visitor numbers remain at an increase of 6.4% as they do not stay overnight. As mentioned before, we have seen a downturn in serviced accommodation numbers, and now also visitor days by -10.4%. This points to not only fewer visitors, but also visitors spending slightly less time in serviced accommodation. Given the current economic uncertainties and constraints, this might be expected, but we will be keeping an eye on the general pattern.



Key Figures: Visitor Days 2025

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**2.671**	**1.331**	**5.295**	**9.297**	**34.353**	**43.649**
2024 (Millions)	M	2.980	1.230	5.207	9.418	32.295	41.713
Change 24/25 (%)	**%**	**-10.4**	**+8.2**	**+1.7**	**-1.3**	**+6.4**	**+4.6**
Share of Total (%)	%	6.1	3.0	12.1	21.3	78.7	100.0

Average Length of Stay for Different Visitor Types: 2025

Day Visitors 1.0

All Visitors 1.1

Serviced Accommodation 1.9

Staying with Friends/Relatives 2.4

All Staying Visitors 2.4

Non-Serviced Accommodation 4.1

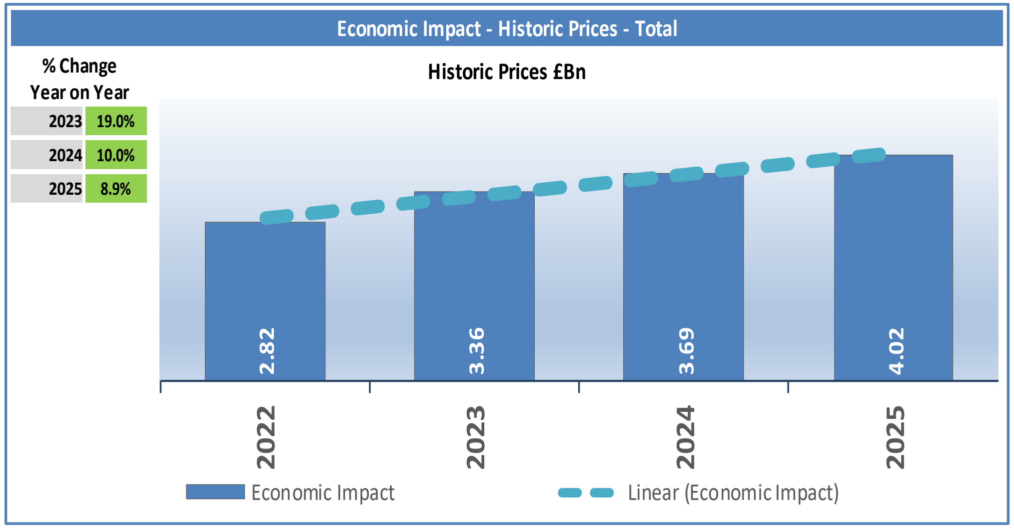
Total Economic Impact

£4.0bn

Economic Impact

The value of tourism activity in South Yorkshire was estimated to be a fraction over £4.0bn in 2025, up by 8.7% on the previous year (or 5.1% when indexed for inflation), and also up by 15.6%, when compared to 2022 and indexed for inflation.

Economic impact is comprised of two sections within the model. The first is the direct expenditure on good and services, in this case, £2.7 billion. To this we conservatively add the indirect economic impact within the area, £1.3 billion, to account for the supply chain- those suppling goods and services to support the visitor sector and its wider infrastructure. By far the most important sector, even with multiple staying visitor days factored in, is the day visitor sector, at £3.2 billion, up 10.2% on the previous year. This is followed by the serviced accommodation sector at £408 million and then the non-serviced accommodation sector at £177 million. The model also estimates the sectoral distribution of the economic impact as follows: Shopping £1.12bn; Food & Drink £726m; Transport £384m; Accommodation £239m; followed closely by Recreation at £224m. The serviced sector has over twice economic impact of the non-serviced sector, but both are dwarfed by the impact of the day visitor sector, which has just over four times the economic impact of All Staying Visitors in South Yorkshire.



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

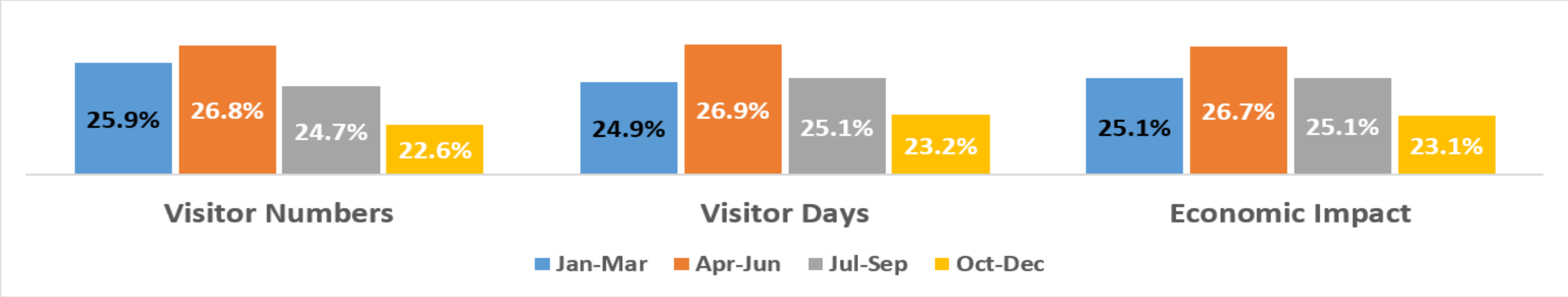
Key Figures: Economic Impact 2025 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (£ Billions)	**£Bn**	**0.408**	**0.177**	**0.189**	**0.774**	**3.242**	**4.016**
2024 (£ Billions)	£Bn	0.412	0.160	0.180	0.752	2.942	3.694
Change 24/25 (%)	**%**	**-1.1**	**+10.4**	**+5.3**	**+2.9**	**+10.2**	**+8.7**
Share of Total (%)	%	10.1	4.4	4.7	19.3	80.7	100.0

Average Economic Impact Generated by Each Type of Visitor: 2025

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£ 152.55**	**£ 132.93**	**£ 35.73**	**£ 83.21**	**£ 94.38**	**£ 92.00**
Economic Impact per Visit	£ 293.97	£ 539.63	£ 85.61	£ 197.17	£ 94.38	£ 104.91

Seasonal Distribution of Key Visitor Metrics: 2025



Total FTEs Supported

32,788

Employment Supported by Tourism

The expenditure and activity of visitors to South Yorkshire supported a total of 32,788 Full-Time Equivalent jobs (FTEs) in 2025; a slight increase of 1.9% on the year before, and 19% above 2022 levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 22,880 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 9,908 FTEs. The Shopping sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 9,842 FTEs, followed by Food & Drink at 7,008 FTEs, then Recreation at 2,628 FTEs followed by Accommodation at 1,747 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2025

Employment Supported by Sector 2025	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	1,747	7,008	2,628	9,842	1,654	22,880	9,908	32,788

STEAM Comparative Headlines: 2024 and 2025 (Unindexed)

STEAM REPORT FOR 2022-2025 - FINAL SOUTH YORKSHIRE LVEP	Comparing 2025 and 2024 All £'s Historic Prices	COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2024 - IN HISTORIC PRICES

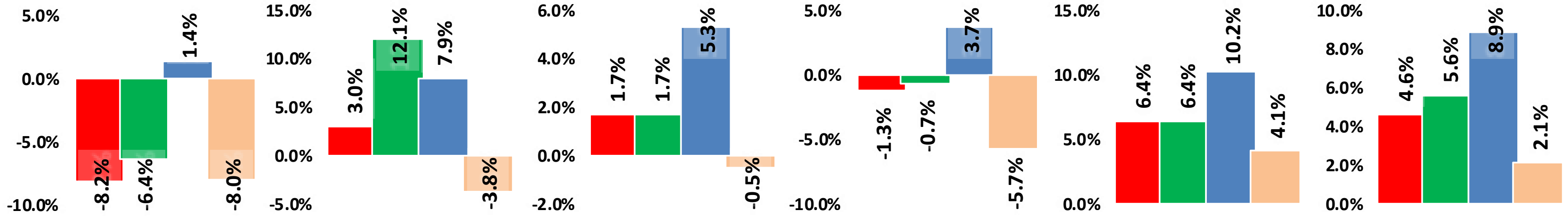
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation																	
		Serviced			Non-Serviced			Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %
Visitor Days	M	2.736	2.980	-8.2%	1.267	1.230	3.0%	5.295	5.207	1.7%	9.298	9.418	-1.3%	34.35	32.29	6.4%	43.65	41.71	4.6%
Visitor Numbers	M	1.427	1.524	-6.4%	0.312	0.278	12.1%	2.210	2.173	1.7%	3.948	3.976	-0.7%	34.35	32.29	6.4%	38.30	36.27	5.6%
Direct Expenditure	£Bn																2.696	2.476	8.9%
Economic Impact	£Bn	0.418	0.412	1.4%	0.173	0.160	7.9%	0.189	0.180	5.3%	0.780	0.752	3.7%	3.242	2.942	10.2%	4.022	3.694	8.9%
Direct Employment	FTEs	2,650	2,882	-8.0%	454	472	-3.8%	1,139	1,145	-0.5%	4,243	4,498	-5.7%	18,685	17,952	4.1%	22,927	22,451	2.1%
Total Employment	FTEs																32,852	32,101	2.3%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2024 - IN HISTORIC PRICES

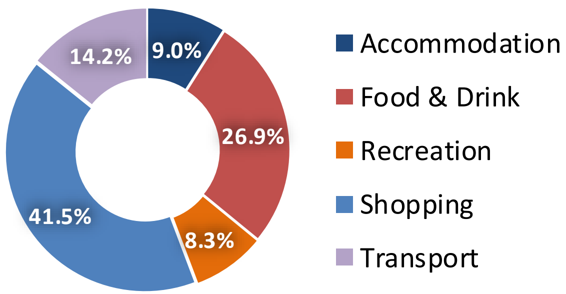
KEY
- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

Serviced | Non-Serviced | SFR | All Staying Visitors | Day Visitors | All Visitor Types

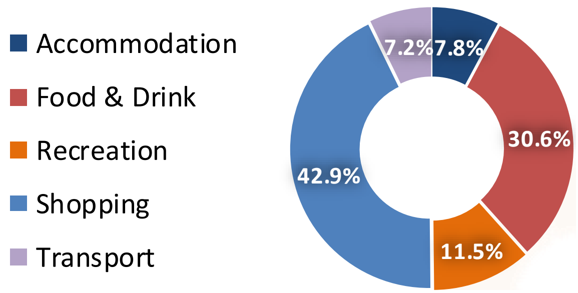


Sectoral Distribution of Economic Impact - £Bn including VAT in Historic Prices / Sectoral Distribution of Employment - FTEs

Sectors	Economic Impact 2025	Economic Impact 2024	+/- %	Employment 2025	Employment 2024	+/- %
Accommodation	0.242	0.226	7.0%	1,788	1,921	-6.9%
Food & Drink	0.726	0.666	9.0%	7,010	6,808	3.0%
Recreation	0.225	0.208	7.8%	2,630	2,584	1.8%
Shopping	1.119	1.023	9.3%	9,846	9,534	3.3%
Transport	0.383	0.351	9.2%	1,653	1,604	3.1%
TOTAL DIRECT	2.696	2.476	8.9%	22,927	22,451	2.1%
Indirect	1.326	1.218	8.9%	9,925	9,651	2.8%
TOTAL	4.022	3.694	8.9%	32,852	32,101	2.3%



Direct Expenditure Categories



Direct Employment Categories

STEAM Comparative Headlines: 2022 and 2025 (Indexed for inflation)

STEAM REPORT FOR 2022-2025 - FINAL SOUTH YORKSHIRE LVEP	Comparing 2025 and 2022 2022 in 2025 prices (1.233)	COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2022 - INDEXED TO 2025

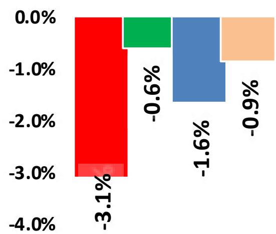
KEY		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
An increase of 3% or more		Serviced			Non-Serviced														
Less than 3% change																			
A Fall of 3% or more		2025	2022	+/- %	2025	2022	+/- %	2025	2022	+/- %	2025	2022	+/- %	2025	2022	+/- %	2025	2022	+/- %
Visitor Days	M	2.736	2.824	-3.1%	1.267	0.836	51.6%	5.295	5.086	4.1%	9.298	8.746	6.3%	34.35	29.24	17.5%	43.65	37.98	14.9%
Visitor Numbers	M	1.427	1.435	-0.6%	0.312	0.189	64.9%	2.210	2.122	4.1%	3.948	3.747	5.4%	34.35	29.24	17.5%	38.30	32.99	16.1%
Direct Expenditure	£Bn																2.696	2.335	15.5%
Economic Impact	£Bn	0.418	0.425	-1.6%	0.173	0.114	51.6%	0.189	0.182	4.1%	0.780	0.721	8.2%	3.242	2.759	17.5%	4.022	3.480	15.6%
Direct Employment	FTEs	2,650	2,673	-0.9%	454	346	31.1%	1,139	1,052	8.3%	4,243	4,072	4.2%	18,685	15,293	22.2%	22,927	19,364	18.4%
Total Employment	FTEs																32,852	27,604	19.0%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2022 - INDEXED TO 2025

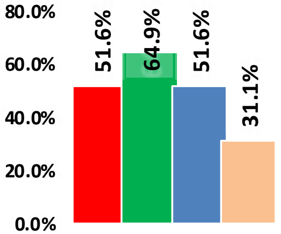
KEY

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

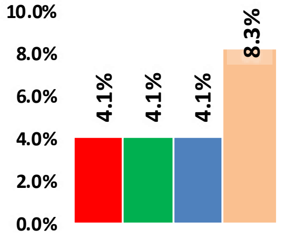
Serviced



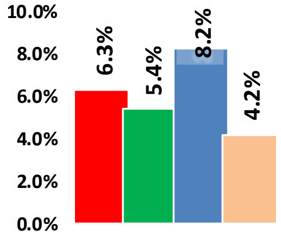
Non-Serviced



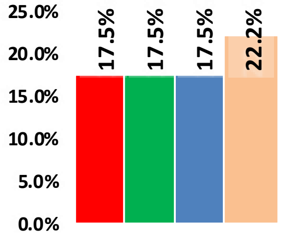
SFR



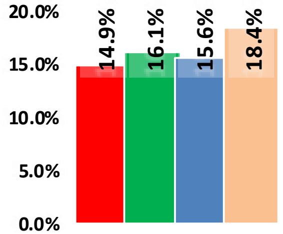
All Staying Visitors



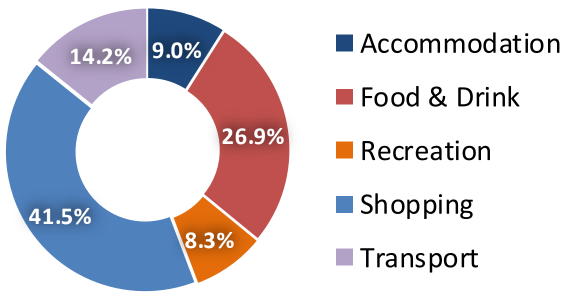
Day Visitors



All Visitor Types

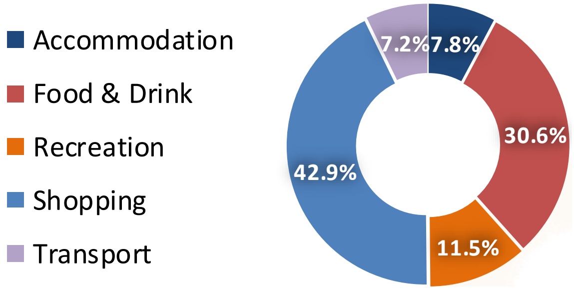


Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2025 / Sectoral Distribution of Employment - FTEs



Direct Expenditure Categories

Economic Impact 2025	Economic Impact 2022	+/- %	Sectors	Employment 2025	Employment 2022	+/- %
0.242	0.216	12.3%	Accommodation	1,788	1,794	-0.3%
0.726	0.627	15.7%	Food & Drink	7,010	5,824	20.4%
0.225	0.197	14.0%	Recreation	2,630	2,219	18.5%
1.119	0.964	16.1%	Shopping	9,846	8,156	20.7%
0.383	0.331	16.0%	Transport	1,653	1,371	20.6%
2.696	2.335	15.5%	TOTAL DIRECT	22,927	19,364	18.4%
1.326	1.145	15.8%	Indirect	9,925	8,240	20.4%
4.022	3.480	15.6%	TOTAL	32,852	27,604	19.0%



Direct Employment Categories