South Yorkshire Local Visitor Economic Partnership

STEAM Tourism Economic Impacts 2024 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 2022-2024. 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

36.3 million tourism visits to **South Yorkshire** in **2024**

4.0 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **9.4 million nights** in local accommodation

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

On average, visitors **staying in the area** spend **2.7** nights in the area and spend a total of **£226 million** on local accommodation

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

Visitor activity and spend supports more than 32,101 full time equivalent jobs locally

A total of **£3.7 billion** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Day Visits to South Yorkshire generated **£2.9 billion** for the local economy in **2024**

In total, **staying visitors** generate a **total economic impact** of **£752 million** for local businesses and communities

Trends 2023-2024

Economic Impact +10%

Visitor Numbers +4.7%

Total Visitor Days and Nights +4.7%

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
11% of Visits

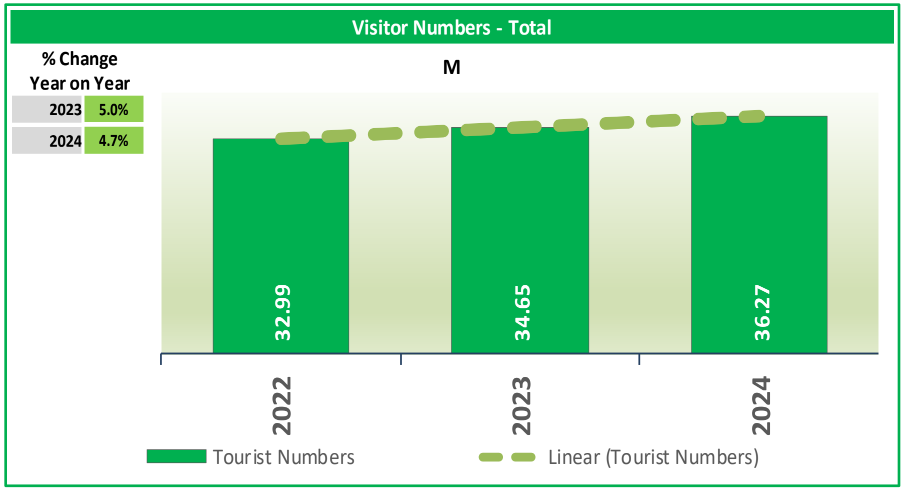
Day Visitors
89% of Visits

Total Visitor Numbers
36.3m

Visitor Numbers

There were an estimated 36.3m tourism visits to South Yorkshire in 2024, up by 4.7% from the previous year, and up by 10% from estimated 2022 visitor numbers, mainly due to increases in those staying in non-serviced accommodation and in day visitor numbers.

In 2024, 4.0m visitors stayed in some sort of accommodation within the area. This sector saw an increase of 2.0% when compared to the previous year and is now 6.1% above numbers reported in 2022. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a fractional decrease of -1.3% over the last year but is now 6.2% above 2022 estimates. In contrast, the smaller non-serviced accommodation sector was up 36.2% on the previous year and is now well above 2022 visitor numbers by 47%, partially due to an increase in accommodation bedstock. 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, and are now 10.5% above 2022 visitor numbers, which has had a positive knock-on effect on total visitor numbers as a whole, as day visitors represent 89% of all visitor numbers to South Yorkshire.



Key Figures: Visitor Numbers 2024

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	**M**	**1.524**	**0.278**	**2.173**	**3.976**	**32.295**	**36.270**
2023 (Millions)	M	1.544	0.204	2.150	3.898	30.750	34.648
Change 23/24 (%)	**%**	**-1.3**	**+36.2**	**+1.1**	**+2.0**	**+5.0**	**+4.7**
Share of Total (%)	%	4.2	0.8	6.0	11.0	89.0	100.0

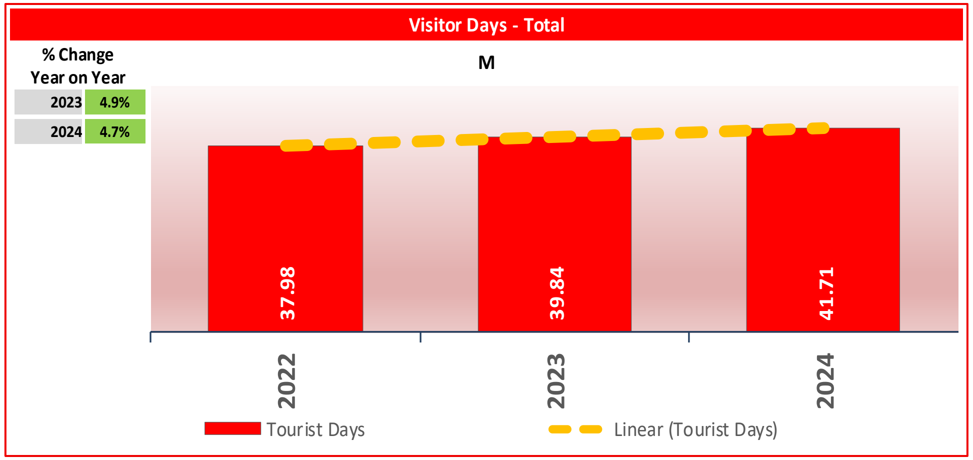
Total Visitor Days

42m

Visitor Days

Visitors spent an estimated 42m days in South Yorkshire 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 9.4m visitor days in 2024, an increase of 3.7% on the previous year, and 7.7% above 2022 estimates. The serviced accommodation sector decreased fractionally by -1.6% when compared to 2023, but it is 5.5% above 2022 figures. In contrast, the smaller non-serviced accommodation sector is up 36% on the previous year, and is now well above 2022 levels, which could indicate that the non-serviced sector recovered from the residual effects of covid 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 day visitors to South Yorkshire.



Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	**M**	**2.980**	**1.230**	**5.207**	**9.418**	**32.295**	**41.713**
2023 (Millions)	M	3.029	0.904	5.152	9.086	30.750	39.835
Change 23/24 (%)	**%**	**-1.6**	**+36.0**	**+1.1**	**+3.7**	**+5.0**	**+4.7**
Share of Total (%)	%	7.1	2.9	12.5	22.6	77.4	100.0

Average Length of Stay for Different Visitor Types: 2024

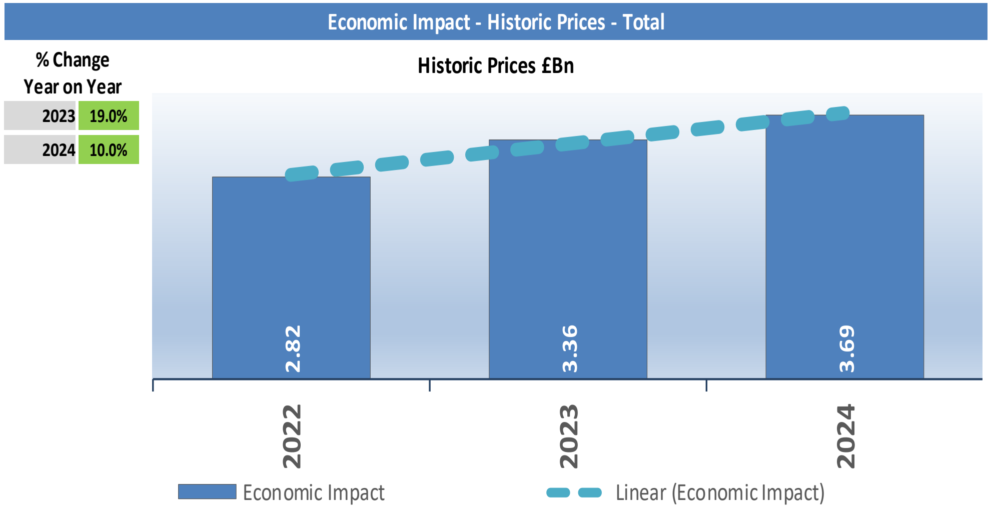
Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors	Non-Serviced Accommodation
1.0	1.2	2.0	2.4	2.4	4.4

Total Economic Impact

£3.7bn

Economic Impact

The value of tourism activity in South Yorkshire was estimated to be £3.7bn in 2024, up by 10% (4.8% when indexed for inflation) on the previous year, and also up by 10% (indexed for inflation) when compared to 2022.



The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £2.5bn. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £1.2bn, together totalling £3.7bn. The largest visitor spending sector was Shopping (£1.0bn), followed by Food & Drink (£666m), then Transport (£351m), followed by Accommodation (£226m). The economic impact of the serviced sector was up slightly down -4.2% on the previous year. The smaller non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up significantly up by 39.5% on 2023, again, partly due to more establishments over the past few years. In terms of comparison, the serviced sector has about third more bedspaces than the non-serviced sector and has over 2 ½ times the economic impact. Day visitor economic impact is up 5.0% on the previous year, and is now 10.5% above 2022 levels when indexed for inflation; its economic impact is about four 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

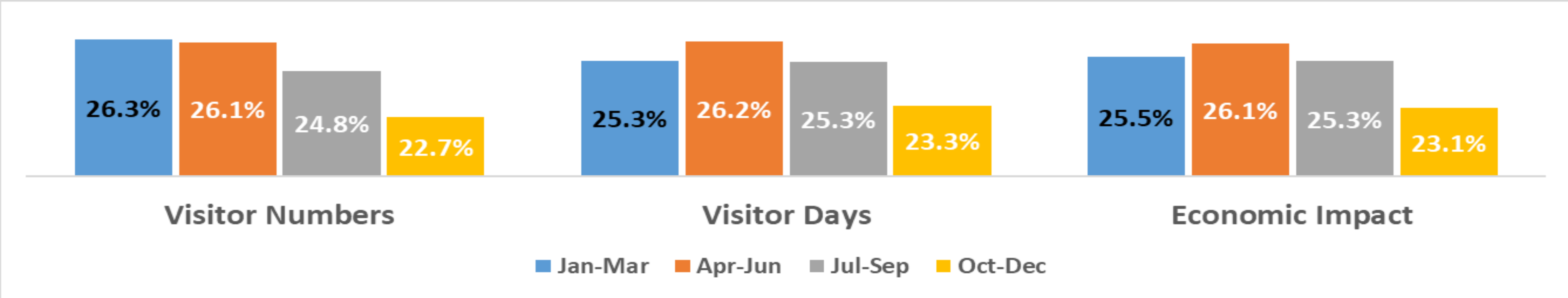
Key Figures: Economic Impact 2024 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Billions)	**£Bn**	**0.412**	**0.160**	**0.180**	**0.752**	**2.942**	**3.694**
2023 (£ Billions)	£Bn	0.430	0.115	0.178	0.723	2.801	3.523
Change 23/24 (%)	**%**	**-4.2**	**+39.5**	**+1.1**	**+4.0**	**+5.0**	**+4.8**
Share of Total (%)	%	11.2	4.3	4.9	20.4	79.6	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	**£ 138.23**	**£ 130.26**	**£ 34.49**	**£ 79.82**	**£ 91.09**	**£ 88.55**
Economic Impact per Visit	£ 270.26	£ 576.14	£ 82.64	£ 189.10	£ 91.09	£ 101.84

Seasonal Distribution of Key Visitor Metrics: 2024



Total FTEs Supported

32,101

Employment Supported by Tourism

The expenditure and activity of visitors to South Yorkshire supported a total of 32,101 Full-Time Equivalent jobs (FTEs) in 2024; a slight increase of 3.5% on the year before, and 16.3% above 2022 levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 22,451 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 9,651 FTEs. The Shopping sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 9,534 FTEs, followed by Food & Drink at 6,808 FTEs, then Recreation at 2,584 FTEs closely followed by Accommodation at 1,921 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	1,921	6,808	2,584	9,534	1,604	22,451	9,651	32,101

STEAM Comparative Headlines: 2023 and 2024 (Unindexed)

STEAM REPORT FOR 2022-2024 - FINAL
SOUTH YORKSHIRE LVEP

Comparing 2024 and 2023
All £'s Historic Prices

COMPARATIVE HEADLINES

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

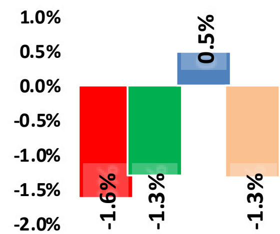
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation – Serviced			Staying in Paid Accommodation – Non-Serviced			Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %
Visitor Days	M	2.980	3.029	-1.6%	1.230	0.904	36.0%	5.207	5.152	1.1%	9.418	9.086	3.7%	32.29	30.75	5.0%	41.71	39.84	4.7%
Visitor Numbers	M	1.524	1.544	-1.3%	0.278	0.204	36.2%	2.173	2.150	1.1%	3.976	3.898	2.0%	32.29	30.75	5.0%	36.27	34.65	4.7%
Direct Expenditure	£Bn																2.476	2.253	9.9%
Economic Impact	£Bn	0.412	0.410	0.5%	0.160	0.110	46.3%	0.180	0.169	6.1%	0.752	0.689	9.2%	2.942	2.669	10.2%	3.694	3.358	10.0%
Direct Employment	FTEs	2,882	2,920	-1.3%	472	404	16.7%	1,145	1,144	0.1%	4,498	4,469	0.7%	17,952	17,268	4.0%	22,451	21,737	3.3%
Total Employment	FTEs																32,101	31,022	3.5%

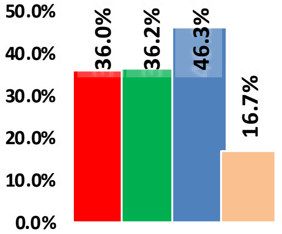
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - IN HISTORIC PRICES

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

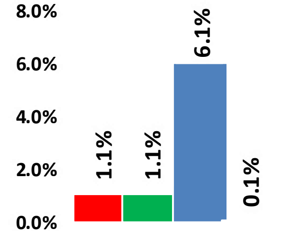
Serviced



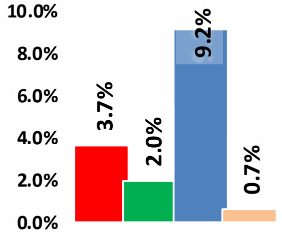
Non-Serviced



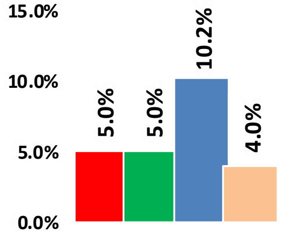
SFR



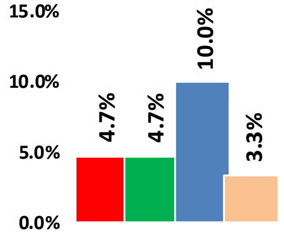
All Staying Visitors



Day Visitors

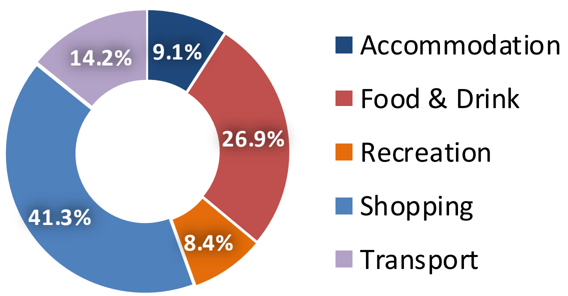


All Visitor Types

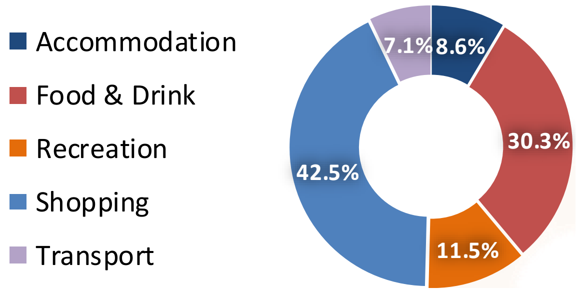


Sectoral Distribution of Economic Impact - £Bn including VAT in Historic Prices / Sectoral Distribution of Employment - FTEs

Sectors	Economic Impact 2024	Economic Impact 2023	+/- %	Employment 2024	Employment 2023	+/- %
Accommodation	0.226	0.205	10.5%	1,921	1,918	0.1%
Food & Drink	0.666	0.606	9.8%	6,808	6,570	3.6%
Recreation	0.208	0.190	9.5%	2,584	2,502	3.3%
Shopping	1.023	0.932	9.8%	9,534	9,201	3.6%
Transport	0.351	0.319	10.0%	1,604	1,545	3.8%
TOTAL DIRECT	2.476	2.253	9.9%	22,451	21,737	3.3%
Indirect	1.218	1.106	10.2%	9,651	9,286	3.9%
TOTAL	3.694	3.358	10.0%	32,101	31,022	3.5%



Direct Expenditure Categories



Direct Employment Categories

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

STEAM REPORT FOR 2022-2024 - FINAL SOUTH YORKSHIRE LVEP	Comparing 2024 and 2022 2022 in 2024 prices (1.19)	COMPARATIVE HEADLINES

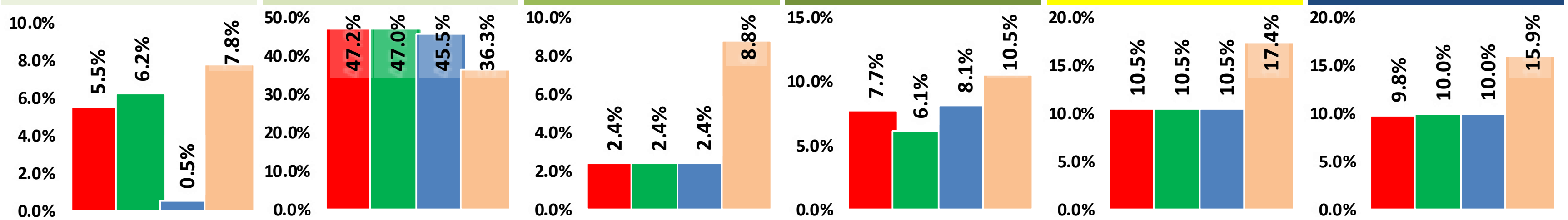
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2022 - INDEXED TO 2024

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

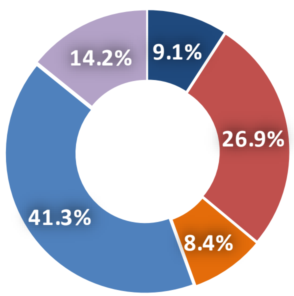
		Staying in Paid Accommodation: Serviced			Staying in Paid Accommodation: Non-Serviced			Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		2024	2022	+/- %	2024	2022	+/- %	2024	2022	+/- %	2024	2022	+/- %	2024	2022	+/- %	2024	2022	+/- %
Visitor Days	M	2.980	2.824	5.5%	1.230	0.836	47.2%	5.207	5.086	2.4%	9.418	8.746	7.7%	32.29	29.24	10.5%	41.71	37.98	9.8%
Visitor Numbers	M	1.524	1.435	6.2%	0.278	0.189	47.0%	2.173	2.122	2.4%	3.976	3.747	6.1%	32.29	29.24	10.5%	36.27	32.99	10.0%
Direct Expenditure	£Bn																2.476	2.253	9.9%
Economic Impact	£Bn	0.412	0.410	0.5%	0.160	0.110	45.5%	0.180	0.175	2.4%	0.752	0.695	8.1%	2.942	2.663	10.5%	3.694	3.358	10.0%
Direct Employment	FTEs	2,882	2,673	7.8%	472	346	36.3%	1,145	1,052	8.8%	4,498	4,072	10.5%	17,952	15,293	17.4%	22,451	19,364	15.9%
Total Employment	FTEs																32,101	27,604	16.3%

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

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



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

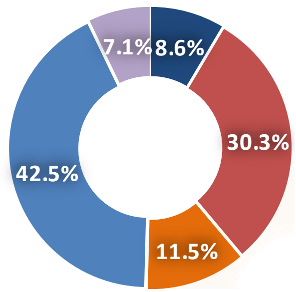


- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

Direct Expenditure Categories

Sectors	Economic Impact 2024	Economic Impact 2022	+/- %	Employment 2024	Employment 2022	+/- %
Accommodation	0.226	0.208	8.8%	1,921	1,794	7.0%
Food & Drink	0.666	0.606	10.0%	6,808	5,824	16.9%
Recreation	0.208	0.190	9.6%	2,584	2,219	16.4%
Shopping	1.023	0.930	10.0%	9,534	8,156	16.9%
Transport	0.351	0.319	10.1%	1,604	1,371	17.0%
TOTAL DIRECT	2.476	2.253	9.9%	22,451	19,364	15.9%
Indirect	1.218	1.105	10.2%	9,651	8,240	17.1%
TOTAL	3.694	3.358	10.0%	32,101	27,604	16.3%

- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport



Direct Employment Categories