Marketing Lancashire

STEAM Tourism Economic Impacts 2023
Year in Review Summary

The Visitor Economy of Lancashire

This is a summary of the annual tourism economic impact research undertaken for Marketing Lancashire, for the calendar years 2012 to 2023. Estimated outputs in this report have been generated using the Scarborough Tourism Economic Activity Monitor (STEAM), owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19 Pandemic	**Some STEAM outputs for 2023 remain below the level of usual economic outputs for the constituent areas, due to the residual effects of the COVID-19 pandemic on business and consumer activity. Some comparisons have been made with estimated pre-covid figures for context.**

2023

66.7 million
Tourism Visits
to the region in 2023

7.6 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **24 million nights** in local accommodation

83 million Visitor Days and Nights generated by Visitors in 2023

On average, visitors **staying in the region** spend **3.2** nights in the area and spend a total of **£446 million** on local accommodation

59 million tourism visits made by **Day Visitors** in 2023

Visitor activity and spend supports more than **57,311 full time equivalent jobs** locally

A total of **£5.4 billion** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Day Visits to the area generated **£2.78 billion** for the local economy in 2023

In total, **staying visitors** generate a **total economic impact** of **£2.62 billion** for local businesses and communities

Trends 2022-2023

Economic Impact -1.2%

Visitor Numbers 2.8%

Total Visitor Days and Nights 1.3%

2023

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
66.7m

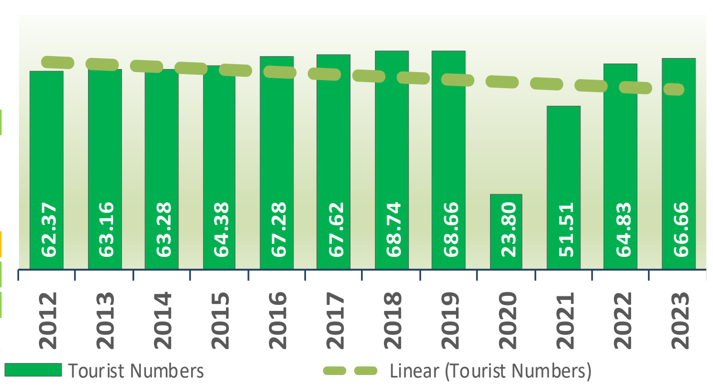
Visitor Numbers

There were an estimated 66.7m tourism visits to the region in 2023, up by 2.8% from the previous year. Visitor numbers have recovered steadily over the past four years and are now only -3.0% below pre-covid estimates.

In 2023, 7.6m visitors stayed in some sort of accommodation within the area. This sector saw a marginal decrease of -1.9% when compared to the previous year and is -7.1% below pre-covid levels, but there are differences in the accommodation sectors that comprise it. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, also saw a marginal decrease of -1.4% over the last year and is still -16.5% below 2018 pre-covid levels. In contrast, the larger non-serviced accommodation sector continues to recover and although down -8.0% on last year, is now 0.6% above 2018 pre-covid levels. While good news, visitor numbers are dominated by the day visitor sector, which represents 89% of visitor numbers to the area. Day visitors throughout the UK are still well below pre-covid levels in some locations, especially in rural and semi-rural locations, so it is encouraging to see that day visitors were up by 3.5% on the previous year, they are now just -2.5% below pre-covid estimates.

Visitor Numbers - Total

% Change Year on Year	
2013	1.3%
2014	0.2%
2015	1.7%
2016	4.5%
2017	0.5%
2018	1.7%
2019	-0.1%
2020	-65.3%
2021	116.4%
2022	25.9%
2023	2.8%



Key Figures: Visitor Numbers 2023

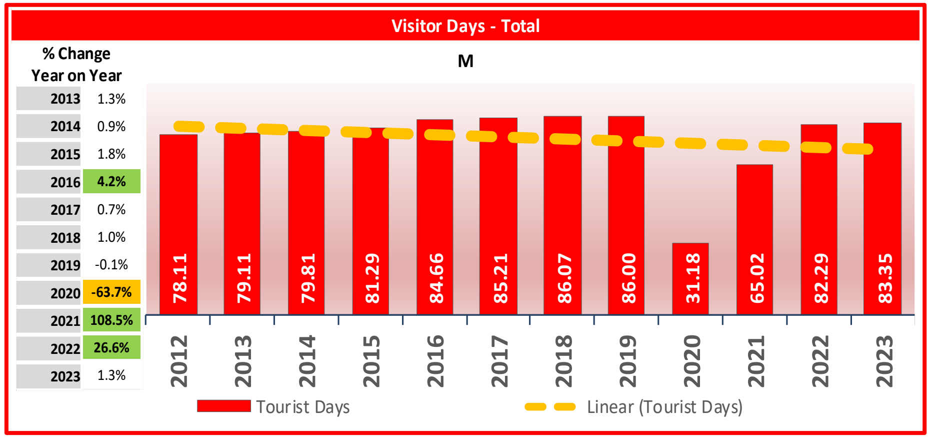
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	**M**	**3.644**	**1.407**	**2.580**	**7.631**	**59.028**	**66.659**
2022 (Millions)	M	3.696	1.530	2.551	7.778	57.051	64.829
Change 22/23 (%)	**%**	**-1.4**	**-8.0**	**+1.1**	**-1.9**	**+3.5**	**+2.8**
Share of Total (%)	%	5.5	2.1	3.9	11.4	88.6	100.0

Total Visitor Days

83.4m

Visitor Days

Visitors spent an estimated 83.4m days in the region during 2023, up by 1.3% on the previous year. Visitor days comprises the volume of day visits *and* the total number of days and nights spent by staying visitors. 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 visits to the region generate 3.2 days in the area.



Total staying visitors accounted for 83.4m visitor days in 2023, an increase of 1.3% on the previous year, and now only -3.2% below 2018 pre-covid levels. The serviced accommodation sector decreased slightly by -1.8% when compared to 2022 and is still 17.0% below pre-covid figures reported in 2018. The larger non-serviced accommodation sector is down by -7.9% on the previous year, but unlike the serviced accommodation, it is now above slightly above pre-covid 2018 levels, by 0.6%, which points to the serviced sector recovering at a slower pace to the non-serviced sector, but still performing steadily over the past four years. As mentioned before, day visitors are up by 3.5% on the previous year and at only -2.5% below 2018 pre-covid levels, they are bucking the slow recovery trend for day visitors typically seen across the rest of the UK.

Key Figures: Visitor Days 2023

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	**M**	**7.872**	**9.789**	**6.657**	**24.318**	**59.028**	**83.345**
2022 (Millions)	M	8.018	10.630	6.591	25.239	57.051	82.290
Change 22/23 (%)	**%**	**-1.8**	**-7.9**	**+1.0**	**-3.6**	**+3.5**	**+1.3**
Share of Total (%)	%	9.4	11.7	8.0	29.2	70.8	100.0

Average Length of Stay for Different Visitor Types: 2023

Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors	Non-Serviced Accommodation
1.0	1.3	2.2	2.6	3.2	7.0

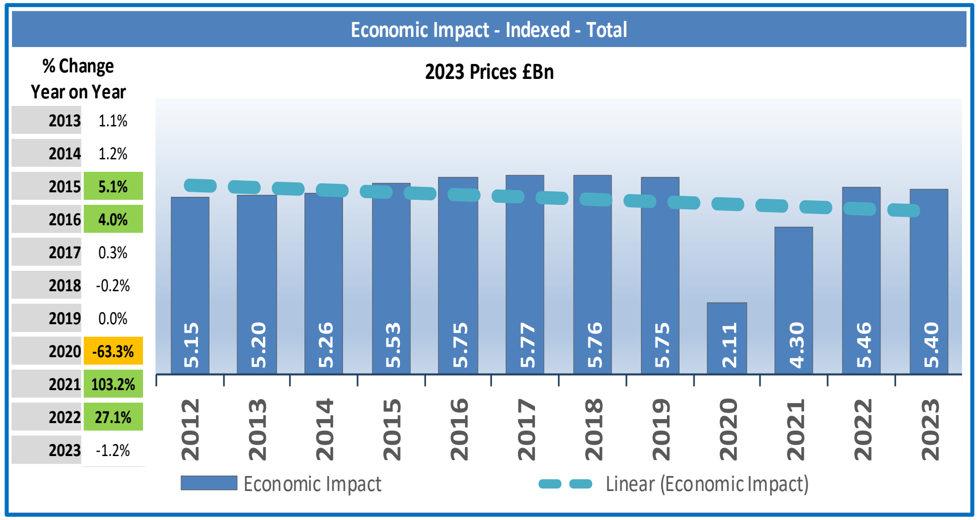
Total Economic Impact

£5.4bn

Economic Impact

The value of tourism activity in the region was estimated to be £5.40bn in 2023 compared to £5.46bn in 2022 (all economic impact figures are indexed to allow for inflation), a marginal decrease in real terms of -1.2%.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £4.07bn. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £1.33bn, together totalling £5.4bn. The largest visitor spending sector was Shopping (£1.47bn), followed closely by Food & Drink (£1.35bn), then Transport (£498m), Accommodation (£446m), and Recreation (£301m). The economic impact of the serviced sector was down -4.4% on the previous year, reflecting very small decreases in visitor numbers/days. The larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was down 10.4% on 2022, again reflecting small drops in visitor numbers /days. In terms of comparison, the non-serviced sector has 10,202 more bedspaces than the serviced sector, but the serviced sector has about 37% more economic impact. Day visitor economic impact is up 3.5% on the previous year and its impact is greater than both of the accommodation sectors combined.



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

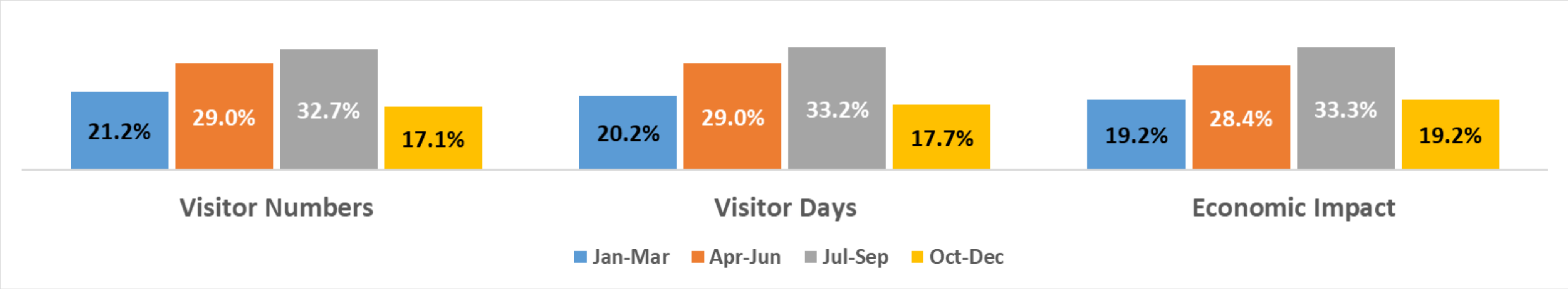
Key Figures: Economic Impact 2023 (Indexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (£ Billions)	**£Bn**	**1.432**	**0.843**	**0.345**	**2.620**	**2.776**	**5.395**
2022 (£ Billions)	£Bn	1.497	0.941	0.342	2.780	2.683	5.462
Change 22/23 (%)	**%**	**-4.4**	**-10.4**	**+1.0**	**-5.8**	**+3.5**	**-1.2**
Share of Total (%)	%	26.5	15.6	6.4	48.6	51.4	100.0

Average Economic Impact Generated by Each Type of Visitor: 2023

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£181.88**	**£86.12**	**£51.86**	**£107.74**	**£47.02**	**£64.74**
Economic Impact per Visit	£392.92	£598.95	£133.82	£343.32	£47.02	£80.94

Seasonal Distribution of Key Visitor Metrics: 2023



Total FTEs Supported

57,311

Employment Supported by Tourism

The expenditure and activity of visitors to the region supported a total of 57,311 Full-Time Equivalent jobs (FTEs) in 2023; an increase of 4.6% on the year before, although still a slight decrease of -5.7% on 2018 pre-covid estimates.

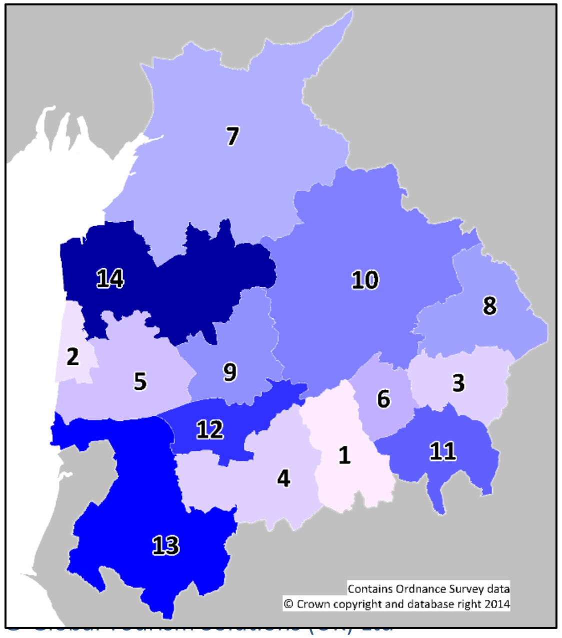
Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 46,163 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 11,148 FTEs. The food & drink sector, followed closely by the shopping sector, were the largest employment sectors supported by tourism activity, followed by the accommodation sector.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2023

Employment Supported by Sector 2023	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	10,627	14,637	3,961	14,526	2,412	46,163	11,148	57,311

STEAM Key Impacts by Authority area: Marketing Lancashire

2023	Outputs by Area	Visitor Numbers			Economic Impact			Employment FTEs		
		Share	Total	% change	Share	Total	% change	Share	Total	% change
1	Blackburn with Darwen Borough Council	6%	3.9m	0.94%	4%	£234.5m	0.58%	4%	2,333	7.20%
2	Blackpool Council	32%	21.57m	6.12%	37%	£1,978.8m	-0.16%	41%	23,419	5.33%
3	Burnley Borough Council	3%	2.27m	1.09%	3%	£149.5m	2.40%	3%	1,468	8.04%
4	Chorley Borough Council	5%	3.12m	0.94%	4%	£207.3m	-0.32%	4%	2,038	6.11%
5	Fylde Borough Council	5%	3.19m	3.87%	6%	£345.7m	-3.25%	6%	3,360	2.54%
6	Hyndburn Borough Council	3%	1.83m	0.75%	2%	£110.8m	0.35%	2%	1,067	7.39%
7	Lancaster City Council	10%	6.96m	1.39%	11%	£597.0m	-2.87%	11%	6,116	3.71%
8	Borough of Pendle	4%	2.49m	-0.66%	3%	£154.4m	-8.49%	3%	1,563	-13.72%
9	Preston City Council	9%	6.06m	2.21%	7%	£400.4m	1.76%	7%	3,947	8.07%
10	Ribble Valley Borough Council	6%	3.83m	0.65%	6%	£305.1m	-2.77%	6%	3,174	3.18%
11	Rossendale Borough Council	2%	1.26m	0.04%	1%	£73.4m	-1.79%	1%	720	3.04%
12	South Ribble Borough Council	5%	3.03m	0.84%	4%	£202.1m	0.21%	4%	2,036	7.04%
13	West Lancashire District Council	4%	2.7m	2.04%	4%	£208.4m	-0.95%	4%	2,035	6.29%
14	Wyre Borough Council	7%	4.44m	1.12%	8%	£428.2m	-4.41%	7%	4,033	3.47%
	LANCASHIRE	100%	66.66m		100%	£5.40bn		100%	57,311	



Notes:

- Visitor Numbers and Economic Impact figures rounded to one decimal place
- The total Economic Impact Figures may appear in this report expressed in millions (m) or billions (bn)
- FTEs are Full Time Equivalent jobs
- % change for Economic Impact is indexed.

STEAM Comparative Headlines: Lancashire 2022 and 2023 (Indexed)

STEAM REPORT FOR 2012-2023 - FINAL LANCASHIRE	Comparing 2023 and 2022 2022 in 2023 prices (1.134)	COMPARATIVE HEADLINES

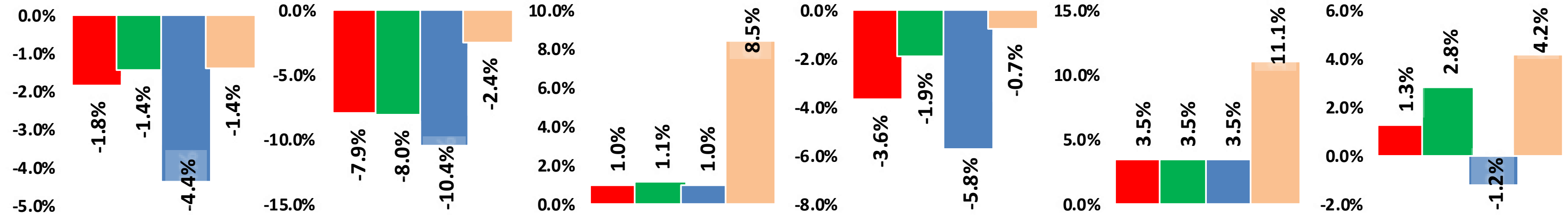
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2022 - INDEXED TO 2023

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

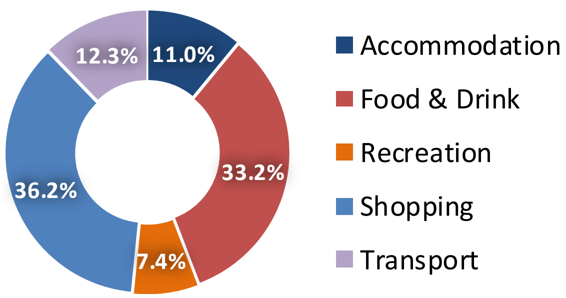
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %
Visitor Days	M	7.872	8.018	-1.8%	9.789	10.63	-7.9%	6.657	6.591	1.0%	24.32	25.24	-3.6%	59.03	57.05	3.5%	83.35	82.29	1.3%
Visitor Numbers	M	3.644	3.696	-1.4%	1.407	1.530	-8.0%	2.580	2.551	1.1%	7.631	7.778	-1.9%	59.03	57.05	3.5%	66.66	64.83	2.8%
Direct Expenditure	£Bn																4.068	4.119	-1.2%
Economic Impact	£Bn	1.432	1.497	-4.4%	0.843	0.941	-10.4%	0.345	0.342	1.0%	2.620	2.780	-5.8%	2.776	2.683	3.5%	5.395	5.462	-1.2%
Direct Employment	FTEs	17,241	17,481	-1.4%	5,889	6,035	-2.4%	2,538	2,340	8.5%	25,667	25,857	-0.7%	20,496	18,451	11.1%	46,163	44,307	4.2%
Total Employment	FTEs																57,311	54,813	4.6%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2023 & 2022 - INDEXED TO 2023

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



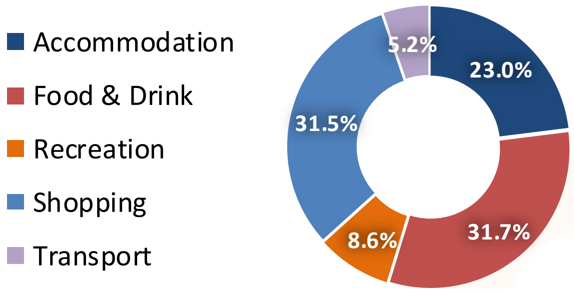
Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2023



Direct Expenditure Categories

Sectoral Distribution of Employment - FTEs

Sectors	Economic Impact 2023	Economic Impact 2022	+/- %	Employment 2023	Employment 2022	+/- %
Accommodation	0.446	0.512	-12.8%	10,627	11,362	-6.5%
Food & Drink	1.351	1.343	0.6%	14,637	13,547	8.0%
Recreation	0.301	0.302	-0.2%	3,961	3,695	7.2%
Shopping	1.471	1.462	0.6%	14,526	13,444	8.0%
Transport	0.498	0.501	-0.5%	2,412	2,259	6.8%
TOTAL DIRECT	4.068	4.119	-1.2%	46,163	44,307	4.2%
Indirect	1.327	1.343	-1.2%	11,148	10,506	6.1%
TOTAL	5.395	5.462	-1.2%	57,311	54,813	4.6%



Direct Employment Categories

STEAM Comparative Headlines Covid-19 Recovery: Lancashire 2018 and 2023 (Indexed)

STEAM REPORT FOR 2012-2023 - FINAL
LANCASHIRE

Comparing 2023 and 2018
2018 in 2023 prices (1.305)

COMPARATIVE HEADLINES

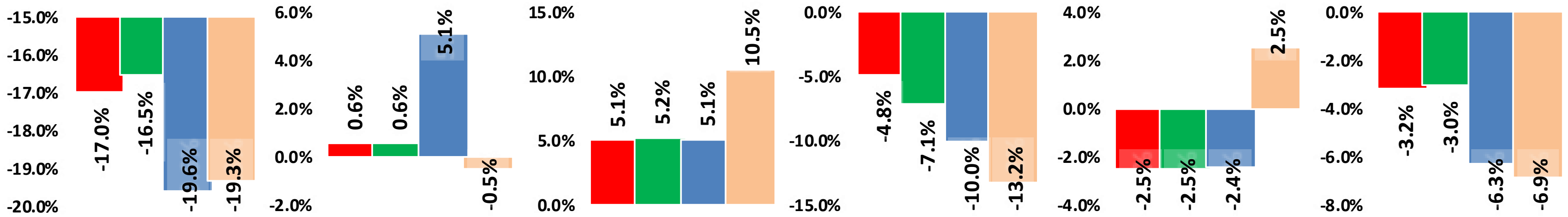
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2018 - INDEXED TO 2023

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

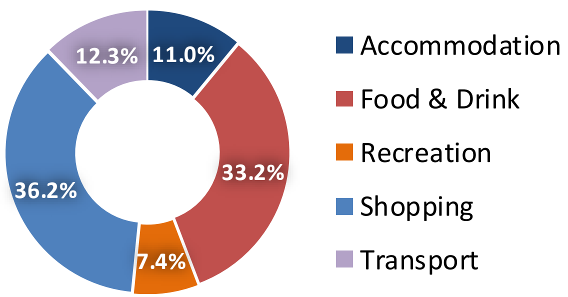
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2023	2018	+/- %	2023	2018	+/- %	2023	2018	+/- %	2023	2018	+/- %	2023	2018	+/- %	2023	2018	+/- %
Visitor Days	M	7.872	9.481	-17.0%	9.789	9.732	0.6%	6.657	6.337	5.1%	24.32	25.55	-4.8%	59.03	60.52	-2.5%	83.35	86.07	-3.2%
Visitor Numbers	M	3.644	4.366	-16.5%	1.407	1.399	0.6%	2.580	2.451	5.2%	7.631	8.216	-7.1%	59.03	60.52	-2.5%	66.66	68.74	-3.0%
Direct Expenditure	£Bn																4.068	4.354	-6.6%
Economic Impact	£Bn	1.432	1.781	-19.6%	0.843	0.802	5.1%	0.345	0.328	5.1%	2.620	2.912	-10.0%	2.776	2.845	-2.4%	5.395	5.756	-6.3%
Direct Employment	FTEs	17,241	21,370	-19.3%	5,889	5,917	-0.5%	2,538	2,298	10.5%	25,667	29,585	-13.2%	20,496	19,991	2.5%	46,163	49,576	-6.9%
Total Employment	FTEs																57,311	60,782	-5.7%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2023 & 2018 - INDEXED TO 2023

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



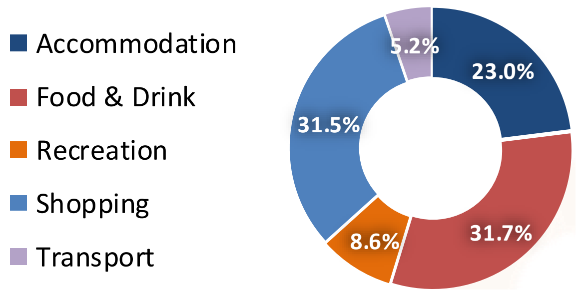
Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2023



Direct Expenditure Categories

Sectors	Economic Impact 2023	Economic Impact 2018	Economic Impact +/- %	Employment 2023	Employment 2018	Employment +/- %
Accommodation	0.446	0.523	-14.6%	10,627	13,829	-23.1%
Food & Drink	1.351	1.418	-4.7%	14,637	14,614	0.2%
Recreation	0.301	0.322	-6.6%	3,961	4,034	-1.8%
Shopping	1.471	1.558	-5.6%	14,526	14,643	-0.8%
Transport	0.498	0.533	-6.5%	2,412	2,456	-1.8%
TOTAL DIRECT	4.068	4.354	-6.6%	46,163	49,576	-6.9%
Indirect	1.327	1.402	-5.3%	11,148	11,206	-0.5%
TOTAL	5.395	5.756	-6.3%	57,311	60,782	-5.7%

Sectoral Distribution of Employment - FTEs



Direct Employment Categories