

The Visitor Economy of Sheffield

This is a summary of the annual tourism economic impact research undertaken for Sheffield for the calendar year 2022. Outputs in this report have been generated using STEAM, the tourism specific economic impact model, owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19
Pandemic

Some STEAM outputs for 2022 remain below the level of usual economic outputs for the area, due to the residual effects of the COVID-19 pandemic on business and consumer activity. Comparisons have been made to show performance levels against a pre-COVID-19 baselines.

Page 43

2022

15.8 million
Tourism Visits
to Sheffield in 2022

1.7 million visits were made by visitors **staying within the City area** as part of a holiday or short break, generating **3.8 million nights** in local accommodation

17.9 million
Visitor Days and
Nights generated by
Visitors in 2022

On average, visitors **staying in Sheffield** spend **2.3** nights in the area and spend a total of **£82 million** on local accommodation

14.1 million tourism visits made
by **Day Visitors** in 2022

Day Visits to
Sheffield
generated **£1.1**
Billion for the
local economy in
2022

In total, **staying**
visitors generate
a **total economic**
impact of £272
million for local
businesses and
communities

Visitor
activity and
spend
supports
more than
13,285 full
time
equivalent
jobs locally

A total of **£1.35 Billion** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Trends
2019-2022

Economic Impact -1.2%

Visitor Numbers -11.9%

Total Visitor Days and Nights -10.8%

2022

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

10.7% of Visits

Day Visitors

89.3% of Visits

Total Visitor Numbers
15.78m

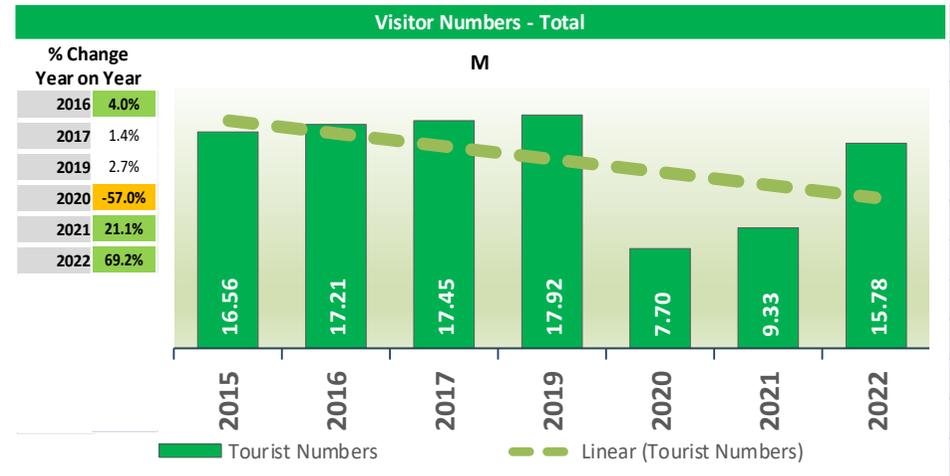
Page 4

Visitor Numbers

There were an estimated 15.78m tourism visits to Sheffield in 2022. Between 2015 and 2019, however, the city had seen the total number of visits by rise by 8.2% to a pre-covid total of 17.92m.

In 2022, 1.69 visitors stayed in some sort of accommodation within the city. This sector as a whole saw a significant increase (47.8%) compared to 2021, this continues the strong recovery we saw last year, and is now only -5.9% below pre-covid 2019 figures. Serviced accommodation rose by 46.7% over the last year and is now hovering at -9.2% below pre-covid levels. Although small, the non-serviced accommodation sector continues a rapid recovery, gaining 84.9% last year, and is already 59.4% above pre-covid figures.

While Sheffield's staying visitor numbers are approaching or have surpassed pre-covid levels, the day visitor sector is still lagging slightly behind, as it is in other areas of the country. Despite growing by 72.2% in 2022, it is still -12.6% below pre-covid levels.



Key Figures: Visitor Numbers 2022

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	M	0.790	0.047	0.856	1.693	14.091	15.784
2019 (Millions)	M	0.870	0.030	0.900	1.799	16.122	17.921
Change 19/22 (%)	%	-9.2	+59.4	-4.8	-5.9	-12.6	-11.9
Share of Total (%)	%	5.0	0.3	5.4	10.7	89.3	100.0

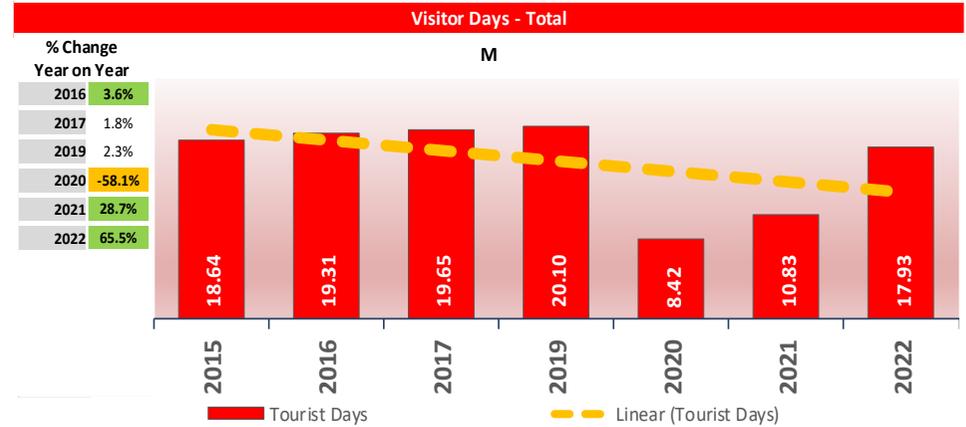
**Total
Visitor
Days
17.93m**

Visitor Days

Visitors spent an estimated 17.93m days in Sheffield during 2022. This 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 Sheffield generate 2.3 days in the city.

Total staying visitors accounted for 3.84m visitor days in 2022, an increase of 44.7% on 2021 and they are now just -3.6% below pre-covid 2019 figures. The serviced accommodation sector saw a 39.2% increase when

compared to 2021, and is now just -8.8% below pre-covid figures reported in 2019. The non-serviced sector has also recovered to above pre-covid levels with a substantial increase of 84.2% compared to 2021, and is now sitting at 58.5% above 2019 pre-covid levels, evidencing a strong recovery for this small sector. While staying visitor numbers are close to recovery, day visitor numbers are still in the process. While they have increased year-on-year since 2019, and by 72.2% since 2021, they are still lagging -12.6% behind pre-covid day visitor numbers, a general pattern seen throughout the UK.



Key Figures: Visitor Days 2022

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	M	1.578	0.207	2.052	3.836	14.091	17.928
2019 (Millions)	M	1.730	0.131	2.117	3.978	16.122	20.099
Change 19/22 (%)	%	-8.8	+58.5	-3.1	-3.6	-12.6	-10.8
Share of Total (%)	%	8.8	1.2	11.4	21.4	78.6	100.0

Average Length of Stay for Different Visitor Types: 2022



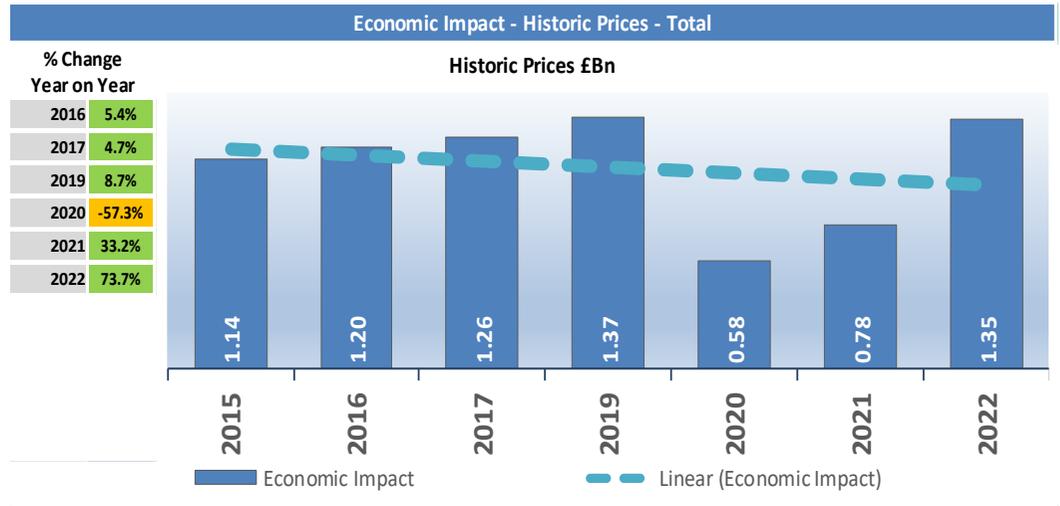
Total Economic Impact
£1.35bn

Economic Impact

The value of tourism activity in Sheffield was estimated to be £1.35bn in 2022 (a substantial increase of 73.7% on the previous year). In comparison, the city’s visitor economy was worth £1.37bn in 2019, so the economic impact of tourism is just fractionally below (-1.2%) pre-covid levels for the first time since the pandemic affected tourism activity.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £906m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were

estimated to account for a further £444m, together totalling £1.35bn. The largest visitor spending sector was Shopping (£376m), followed by Food and Drink (£244m), Transport (£128m), Accommodation (£82m), and Recreation (£77m). In 2022, the city’s day visitor market accounted for 79.9% of the value of tourism activity (£1.08bn), just -1.9% below pre-covid economic activity. Meanwhile, the staying visitor market accounted for the remaining 20.1% of economic value (£272m) and as such is just above pre-covid levels at +1.7%, with the small non-serviced sector almost double 2019 levels at +94.4%, influenced by a substantial increase in accommodation provision.



46

- 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

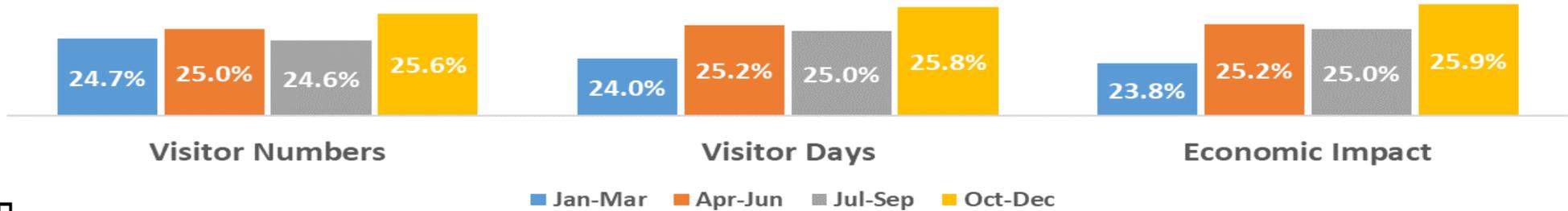
Key Figures: Economic Impact 2022

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (£ Billions)	£Bn	0.198	0.015	0.059	0.272	1.079	1.350
2019 (£ Billions)	£Bn	0.205	0.008	0.055	0.267	1.099	1.366
Change 19/22 (%)	%	-3.6	+94.4	+8.8	+1.7	-1.9	-1.2
Share of Total (%)	%	14.6	1.1	4.4	20.1	79.9	100.0

Average Economic Impact Generated by Each Type of Visitor: 2022

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£ 118.50	£ 57.60	£ 25.81	£ 67.16	£ 68.19	£ 67.98
Economic Impact per Visit	£ 235.58	£ 255.01	£ 60.75	£ 148.48	£ 68.19	£ 76.25

Seasonal Distribution of Key Visitor Metrics: 2022



Page 47

Total FTEs Supported
13,285

Employment Supported by Tourism

The expenditure and activity of visitors to Sheffield supported a total of 13,285 Full-Time Equivalent jobs (FTEs) in 2022; an increase of 63.5% on the year before, but still -11.9% down on 2019 pre-covid levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 9,347 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 3,938 FTEs. The shopping and food and drink sectors are the largest employment sectors supported by tourism activity, accounting for an estimated 3,918 and 2,795 FTEs respectively.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2022

Employment Supported by Sector 2022	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	917	2,795	1,063	3,918	654	9,347	3,938	13,285

STEAM Comparative Headlines: 2019 and 2022 Covid Recovery

STEAM REPORT FOR 2015-2022 - FINAL

SHEFFIELD

Comparing 2022 and 2019

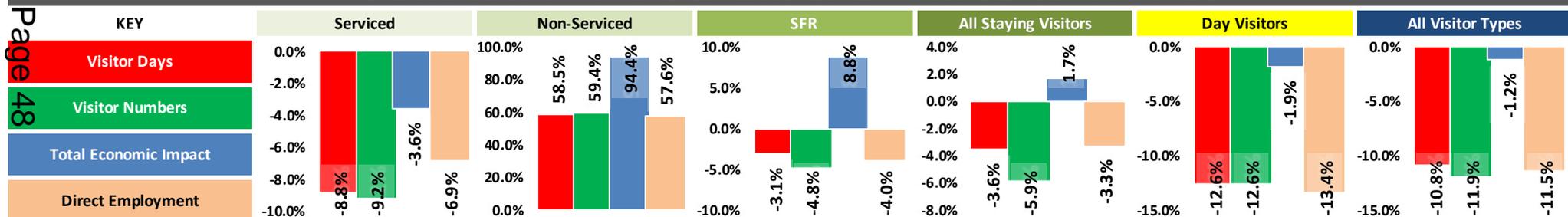
All £'s Historic Prices

COMPARATIVE HEADLINES

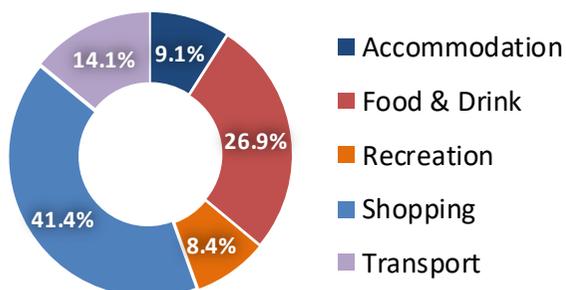
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2019 - IN HISTORIC PRICES

KEY	KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2019 - IN HISTORIC PRICES																		
	Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types			
	Serviced			Non-Serviced															
	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	
Visitor Days	M	1.578	1.730	-8.8%	0.207	0.131	58.5%	2.052	2.117	-3.1%	3.836	3.978	-3.6%	14.09	16.12	-12.6%	17.93	20.10	-10.8%
Visitor Numbers	M	0.790	0.870	-9.2%	0.047	0.030	59.4%	0.856	0.900	-4.8%	1.693	1.799	-5.9%	14.09	16.12	-12.6%	15.78	17.92	-11.9%
Direct Expenditure	£Bn																0.906	0.917	-1.1%
Economic Impact	£Bn	0.198	0.205	-3.6%	0.015	0.008	94.4%	0.059	0.055	8.8%	0.272	0.267	1.7%	1.079	1.099	-1.9%	1.350	1.366	-1.2%
Direct Employment	FTEs	1,404	1,508	-6.9%	148	94	57.6%	424	442	-4.0%	1,977	2,044	-3.3%	7,370	8,513	-13.4%	9,347	10,556	-11.5%
Total Employment	FTEs																13,285	15,076	-11.9%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2019 - IN HISTORIC PRICES



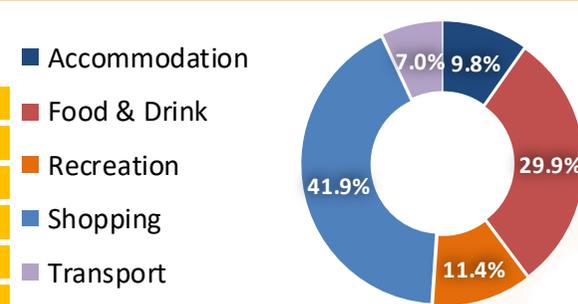
Sectoral Distribution of Economic Impact - £Bn including VAT in Historic Prices



Sectors	2022	2019	+/- %
Accommodation	0.082	0.086	-4.1%
Food & Drink	0.244	0.246	-0.8%
Recreation	0.077	0.076	0.2%
Shopping	0.376	0.380	-1.1%
Transport	0.128	0.129	-0.6%
TOTAL DIRECT	0.906	0.917	-1.1%
Indirect	0.444	0.450	-1.3%
TOTAL	1.350	1.366	-1.2%

Sectoral Distribution of Employment - FTEs

Sectors	2022	2019	+/- %
Accommodation	917	924	-0.8%
Food & Drink	2,795	3,193	-12.5%
Recreation	1,063	1,202	-11.5%
Shopping	3,918	4,492	-12.8%
Transport	654	745	-12.3%
TOTAL DIRECT	9,347	10,556	-11.5%
Indirect	3,938	4,520	-12.9%
TOTAL	13,285	15,076	-11.9%



Direct Employment Categories

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