STEAM Tourism Economic Impacts 2022
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 2011 to 2022. 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 2022 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.**

2022

64.8 million Tourism Visits to the region in 2022

7.8 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **25 million nights** in local accommodation

82 million Visitor Days and Nights generated by Visitors in 2022

On average, visitors **staying in** the region spend **3.2** nights in the area and spend a total of **£452 million** on local accommodation

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

Visitor activity and spend supports more than **54,813 full time equivalent jobs** locally

A total of **£4.8 billion** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Day Visits to the area generated **£2.36 billion** for the local economy in 2022

In total, **staying visitors** generate a **total economic impact** of **£2.45 billion** for local businesses and communities

Trends 2018-2022

Economic Impact -5% (When adjusted in line with inflation)

Visitor Numbers -5.7%

Total Visitor Days and Nights -4.4%

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
12% of Visits

Day Visitors
88% of Visits

Total Visitor Numbers
64.8m

Visitor Numbers

There were an estimated 64.8m tourism visits to the region in 2022, down slightly by -5.7% from 68.7m visitors in 2018. Visitor numbers have recovered steadily over the past three years, gaining by 25.9% since 2021, with the recovery very evenly spread throughout all sectors.

In 2022, 7.78m visitors stayed in some sort of accommodation within the area. The staying visitor sector as a whole, at -5.3%, is just slightly below visitor numbers compared to 2018 and as a result it is still hovering below pre-covid levels. But within the staying visitor category there are marked differences. The region's large serviced accommodation sector is still -15.3% below 2018 estimates and is therefore also below pre-covid levels. Although smaller, the non-serviced accommodation sector continues to recover more rapidly, and in contrast to the serviced sector, is now 9.3% above 2018 levels, evidencing a recovery past pre-covid levels. The non-serviced sector was the first to open up post covid, and as a result was perhaps initially perceived as the safe option for staying visitors. Serviced accommodation sectors have recovered to pre-covid levels in other parts of the country, but like Lancashire, at a slightly slower pace.

Key Figures: Visitor Numbers 2022

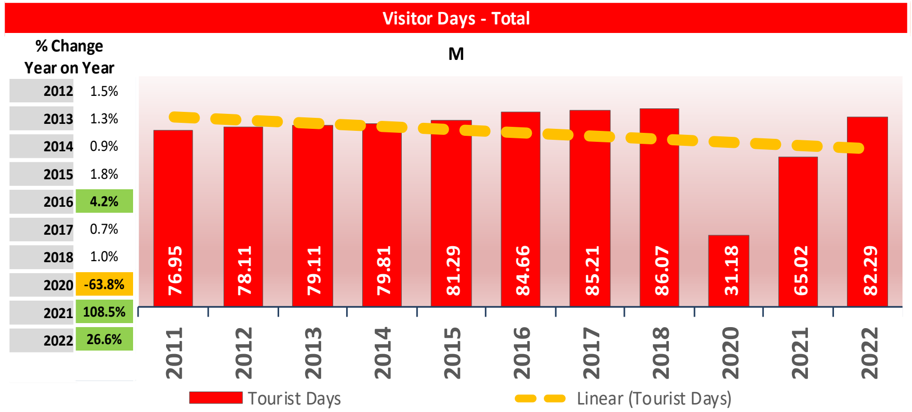
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	**M**	**3.696**	**1.530**	**2.551**	**7.778**	**57.051**	**64.829**
2018 (Millions)	M	4.366	1.399	2.451	8.216	60.525	68.741
Change 18/22 (%)	**%**	**-15.3**	**+9.3**	**+4.1**	**-5.3**	**-5.7**	**-5.7**
Share of Total (%)	%	5.7	2.4	3.9	12.0	88.0	100.0

Total Visitor Days

82.3m

Visitor Days

Visitors spent an estimated 82.29m days in the region during 2022, down slightly by -4.4% on 2018, when visitor days were estimated at 86.1m. 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 25.2m visitor days in 2022, a marginal decrease of -1.2% when compared to 2018. But as with visitor numbers, there are variations within the sector. The serviced accommodation sector is still -15.4% below estimated pre-covid levels when compared to 2018. In contrast, the smaller non-serviced sector, at 9.2%, has recovered past pre-covid levels. Day visitor numbers throughout the UK have remained, for the most part, stubbornly below pre-covid levels, in some cases, substantially. A subtle change in visitor patterns, combined with the current economic climate, may be the cause. So, at only -5.7% below 2018 figures (and with a rise of 25% compared to 2021) Lancashire's day visitor sector is bucking the normal trend and is well on track to recovery.

Key Figures: Visitor Days 2022

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	**M**	**8.018**	**10.630**	**6.591**	**25.239**	**57.051**	**82.290**
2018 (Millions)	M	9.481	9.732	6.337	25.550	60.525	86.074
Change 18/22 (%)	**%**	**-15.4**	**+9.2**	**+4.0**	**-1.2**	**-5.7**	**-4.4**
Share of Total (%)	%	9.7	12.9	8.0	30.7	69.3	100.0

Average Length of Stay for Different Visitor Types: 2022

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	6.9

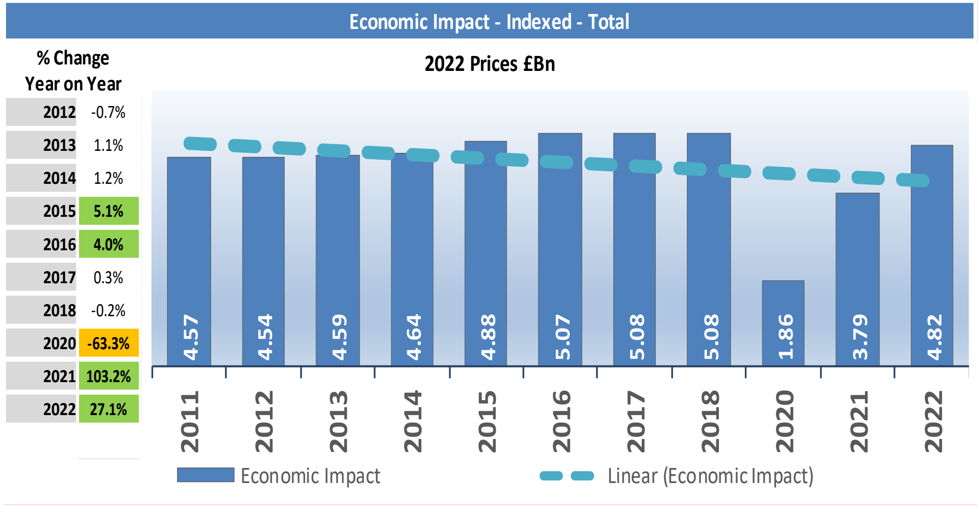
Total Economic Impact

£4.8bn

Economic Impact

The value of tourism activity in the region was estimated to be £4.82bn in 2022 compared to £5.08bn in 2018 (all figures are indexed to allow for inflation), a decrease in real terms of -5.1%.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £3.63bn. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £1.18bn, together totalling £4.8bn. The largest visitor spending sector was Food & Drink (£1.18bn), followed by Shopping (£1.29bn), Accommodation (£452m), Transportation (£442m), and Recreation (£266m).



The economic impact between the staying visitor sector and the day visitor sector is very evenly split. In 2022, the region's day visitor market accounted for 49.1% of the value of tourism activity (£2.36bn). Meanwhile, at £2.45bn, the staying visitor market accounted for the remaining 50.9% of economic value, driven largely by the non-serviced accommodation sector. Day visitor economic impact, again, bucking 'normal' post-covid trends throughout the UK, increased by 25.1% since 2021, and is now only -5.7% below 2018 pre-covid levels.

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

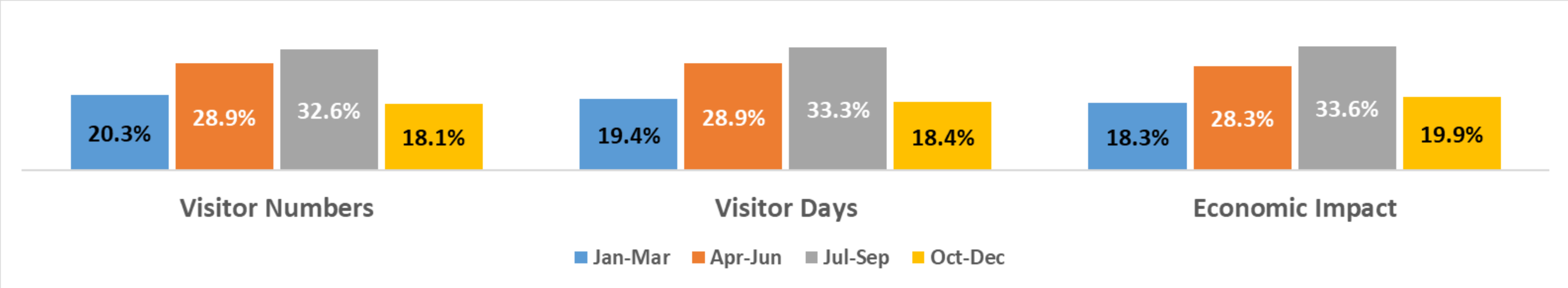
Key Figures: Economic Impact 2022 (Indexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (£ Billions)	**£Bn**	**1.320**	**0.830**	**0.301**	**2.451**	**2.365**	**4.817**
2018 (£ Billions)	£Bn	1.570	0.707	0.290	2.567	2.508	5.076
Change 18/22 (%)	**%**	**-15.9**	**+17.3**	**+4.0**	**-4.5**	**-5.7**	**-5.1**
Share of Total (%)	%	27.4	17.2	6.3	50.9	49.1	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	**£164.63**	**£78.06**	**£45.72**	**£97.12**	**£41.46**	**£58.53**
Economic Impact per Visit	£357.10	£542.34	£118.12	£315.15	£41.46	£74.30

Seasonal Distribution of Key Visitor Metrics: 2022



Total FTEs Supported

54,813

Employment Supported by Tourism

The expenditure and activity of visitors to the region supported a total of 54,813 Full-Time Equivalent jobs (FTEs) in 2022; an increase of 26.8% on the year before, although still a decrease of -9.8% on 2018 pre-covid estimates.

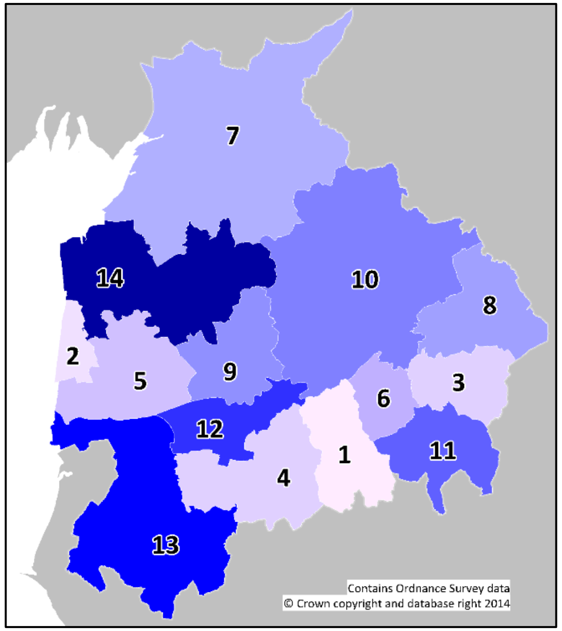
Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 44,307 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 10,506 FTEs. The food & drink 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 2022

Employment Supported by Sector 2022	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	11,362	13,547	3,695	13,444	2,259	44,307	10,506	54,813

STEAM Key Impacts by Authority area: Marketing Lancashire

2018	Outputs by Area	Visitor Numbers		Economic Impact		Employment FTEs	
		Share	Total	Share	Total	Share	Total
1	Blackburn with Darwen Borough Council	6%	4.4m	4%	£189.6m	4%	2,332
2	Blackpool Council	27%	18.2m	36%	£1,581.5m	42%	25,387
3	Burnley Borough Council	4%	2.6m	3%	£119.9m	2%	1,481
4	Chorley Borough Council	5%	3.6m	4%	£188.4m	4%	2,338
5	Fylde Borough Council	5%	3.3m	6%	£263.5m	6%	3,344
6	Hyndburn Borough Council	3%	2.1m	2%	£93.5m	2%	1,125
7	Lancaster City Council	11%	7.7m	11%	£478.6m	10%	6,209
8	Borough of Pendle	4%	2.8m	3%	£130.4m	3%	1,657
9	Preston City Council	10%	7.0m	7%	£330.7m	7%	4,045
10	Ribble Valley Borough Council	6%	4.4m	6%	£260.8m	6%	3,454
11	Rossendale Borough Council	2%	1.4m	1%	£63.6m	1%	816
12	South Ribble Borough Council	5%	3.4m	4%	£176.9m	4%	2,161
13	West Lancashire District Council	4%	2.9m	4%	£170.7m	3%	2,072
14	Wyre Borough Council	7%	4.8m	8%	£361.6m	7%	4,362
	LANCASHIRE	**100%**	**68.7m**	**100%**	**£4,409.6m**	**100%**	**60,782**



2022	Outputs by Area	Visitor Numbers		Economic Impact		Employment FTEs	
		Share	Total	Share	Total	Share	Total
1	Blackburn with Darwen Borough Council	6%	3.87m	4%	£206.6m	4%	2,176
2	Blackpool Council	31%	20.3m	36%	£1,748.7m	41%	22,234
3	Burnley Borough Council	3%	2.25m	3%	£129.7m	3%	1,359
4	Chorley Borough Council	5%	3.09m	4%	£183.4	4%	1,921
5	Fylde Borough Council	5%	3.07m	6%	£315.1	6%	3,277
6	Hyndburn Borough Council	3%	1.82m	2%	£97.4	2%	994
7	Lancaster City Council	11%	6.87m	11%	£542.0	11%	5,897
8	Borough of Pendle	4%	2.50m	3%	£148.8	3%	1,812
9	Preston City Council	9%	5.93m	7%	£346.9	7%	3,653
10	Ribble Valley Borough Council	6%	3.81m	6%	£276.7	6%	3,077
11	Rossendale Borough Council	2%	1.26m	1%	£65.9	1%	699
12	South Ribble Borough Council	5%	2.99m	4%	£177.8	3%	1,902
13	West Lancashire District Council	4%	2.64m	4%	£185.5	3%	1,915
14	Wyre Borough Council	7%	4.40m	8%	£395.0	7%	3,898
	LANCASHIRE	**100%**	**64.8m**	**100%**	**£4.82bn**	**100%**	**54,813**

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
- The STEAM employment outputs for 2021 do not include the jobs / Full Time Equivalents (FTEs) for those employees supported through the government employment support mechanisms on the basis that these are not driven by the expenditure and activity of visitors. Although the STEAM outputs for Lancashire indicate that total employment arising from the visitor economy fell about a third in 2021 (compared to 2018) – not all of the reduction in jobs would be 'lost' through redundancy.

STEAM Comparative Headlines: Lancashire 2018 and 2022 (Indexed)

STEAM REPORT FOR 2011-2022 - FINAL MARKETING LANCASHIRE	Comparing 2022 and 2018 2018 in 2022 prices (1.151)	COMPARATIVE HEADLINES

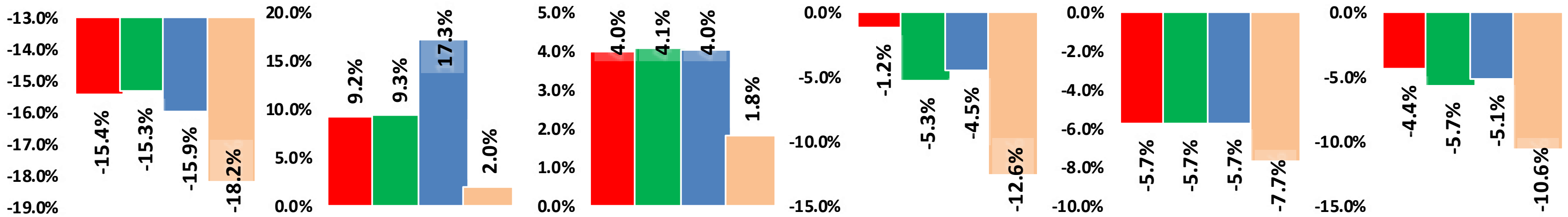
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2018 - INDEXED TO 2022

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		2022	2018	+/- %	2022	2018	+/- %	2022	2018	+/- %	2022	2018	+/- %	2022	2018	+/- %	2022	2018	+/- %
A Fall of 3% or more																			
Visitor Days	M	8.018	9.481	-15.4%	10.63	9.732	9.2%	6.591	6.337	4.0%	25.24	25.55	-1.2%	57.05	60.52	-5.7%	82.29	86.07	-4.4%
Visitor Numbers	M	3.696	4.366	-15.3%	1.530	1.399	9.3%	2.551	2.451	4.1%	7.778	8.216	-5.3%	57.05	60.52	-5.7%	64.83	68.74	-5.7%
Direct Expenditure	£Bn																3.632	3.839	-5.4%
Economic Impact	£Bn	1.320	1.570	-15.9%	0.830	0.707	17.3%	0.301	0.290	4.0%	2.451	2.567	-4.5%	2.365	2.508	-5.7%	4.817	5.076	-5.1%
Direct Employment	FTEs	17,481	21,370	-18.2%	6,035	5,917	2.0%	2,340	2,298	1.8%	25,857	29,585	-12.6%	18,451	19,991	-7.7%	44,307	49,576	-10.6%
Total Employment	FTEs																54,813	60,782	-9.8%

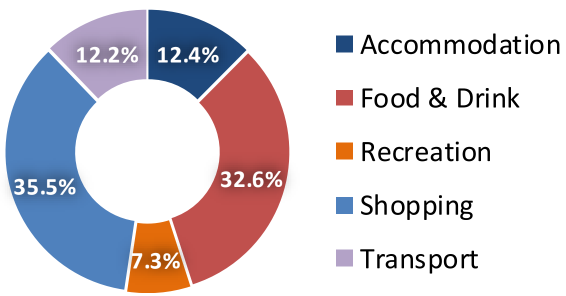
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2018 - INDEXED TO 2022

KEY

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



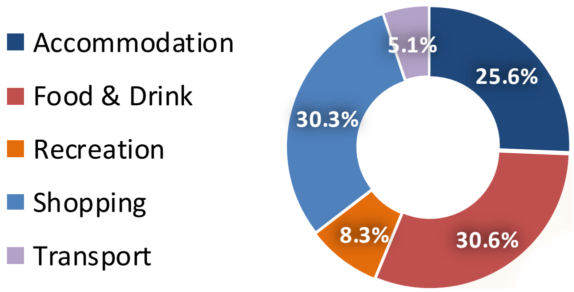
Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2022



Direct Expenditure Categories

Economic Impact 2022	Economic Impact 2018	+/- %	Sectors	Employment 2022	Employment 2018	+/- %
0.452	0.461	-2.0%	Accommodation	11,362	13,829	-17.8%
1.184	1.250	-5.3%	Food & Drink	13,547	14,614	-7.3%
0.266	0.284	-6.4%	Recreation	3,695	4,034	-8.4%
1.289	1.374	-6.2%	Shopping	13,444	14,643	-8.2%
0.442	0.470	-6.0%	Transport	2,259	2,456	-8.0%
3.632	3.839	-5.4%	TOTAL DIRECT	44,307	49,576	-10.6%
1.184	1.236	-4.2%	Indirect	10,506	11,206	-6.3%
4.817	5.076	-5.1%	TOTAL	54,813	60,782	-9.8%

Sectoral Distribution of Employment - FTEs



Direct Employment Categories

STEAM Comparative Headlines: Lancashire 2021 and 2022 (Indexed)

STEAM REPORT FOR 2011-2022 - FINAL MARKETING LANCASHIRE	Comparing 2022 and 2021 2021 in 2022 prices (1.078)	COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2021 - INDEXED TO 2022

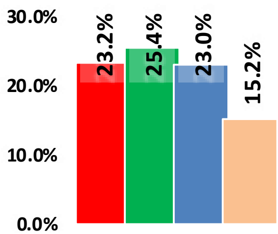
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %
Visitor Days	M	8.018	6.508	23.2%	10.63	8.483	25.3%	6.591	4.399	49.8%	25.24	19.39	30.2%	57.05	45.63	25.0%	82.29	65.02	26.6%
Visitor Numbers	M	3.696	2.949	25.4%	1.530	1.216	25.8%	2.551	1.715	48.7%	7.778	5.880	32.3%	57.05	45.63	25.0%	64.83	51.51	25.9%
Direct Expenditure	£Bn																3.632	2.861	27.0%
Economic Impact	£Bn	1.320	1.073	23.0%	0.830	0.623	33.2%	0.301	0.201	49.8%	2.451	1.897	29.2%	2.365	1.891	25.1%	4.817	3.788	27.1%
Direct Employment	FTEs	17,481	15,175	15.2%	6,035	4,727	27.7%	2,340	1,492	56.8%	25,857	21,394	20.9%	18,451	14,012	31.7%	44,307	35,407	25.1%
Total Employment	FTEs																54,813	43,217	26.8%

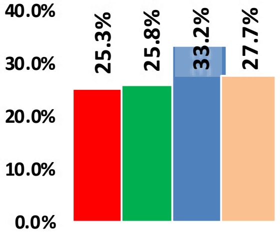
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2021 - INDEXED TO 2022

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

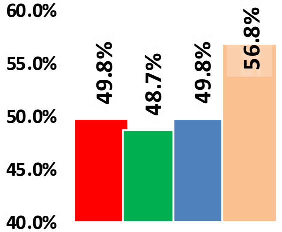
Serviced



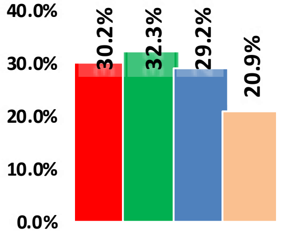
Non-Serviced



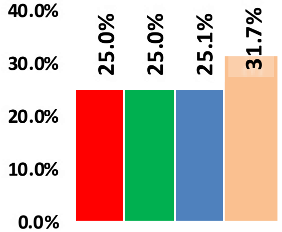
SFR



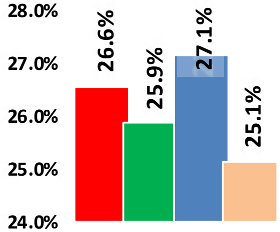
All Staying Visitors



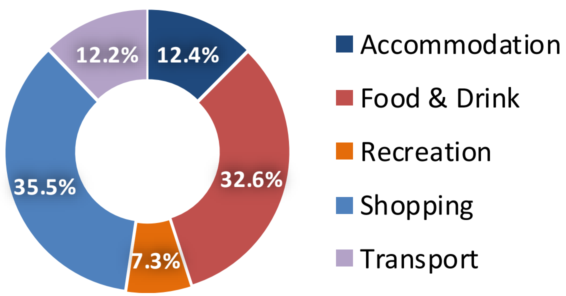
Day Visitors



All Visitor Types

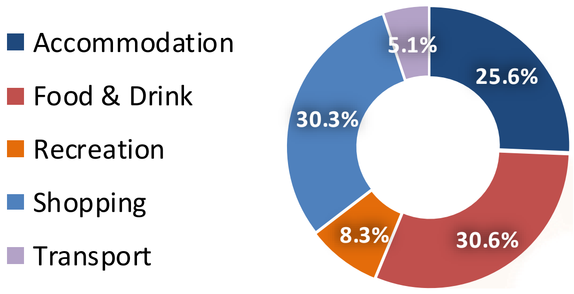


Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2022 / Sectoral Distribution of Employment - FTEs



Direct Expenditure Categories

Sectors	Economic Impact 2022	Economic Impact 2021	+/- %	Employment 2022	Employment 2021	+/- %
Accommodation	0.452	0.336	34.6%	11,362	10,574	7.5%
Food & Drink	1.184	0.938	26.2%	13,547	10,193	32.9%
Recreation	0.266	0.212	25.8%	3,695	2,788	32.5%
Shopping	1.289	1.026	25.6%	13,444	10,156	32.4%
Transport	0.442	0.350	26.4%	2,259	1,696	33.2%
TOTAL DIRECT	3.632	2.861	27.0%	44,307	35,407	25.1%
Indirect	1.184	0.928	27.7%	10,506	7,810	34.5%
TOTAL	4.817	3.788	27.1%	54,813	43,217	26.8%



Direct Employment Categories