STEAM Tourism Economic Impacts
2024 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 2013-2024. 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

68.6 million tourism visits to **Lancashire** in **2024**

7.5 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **23.8 million nights** in local accommodation

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

On average, visitors **staying in the area** spend **3.2** nights in the area and spend a total of **£486 million** on local accommodation

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

Day Visits to Lancashire generated **£3.0 billion** for the local economy in **2024**

In total, **staying visitors** generate a **total economic impact** of **£2.7 billion** for local businesses and communities

Visitor activity and spend supports more than **57,068 full time equivalent jobs** locally

A total of **£5.7 billion** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Trends 2023-2024

Economic Impact +1.4%

Visitor Numbers +3.0%

Total Visitor Days and Nights +1.8%

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
68.6m

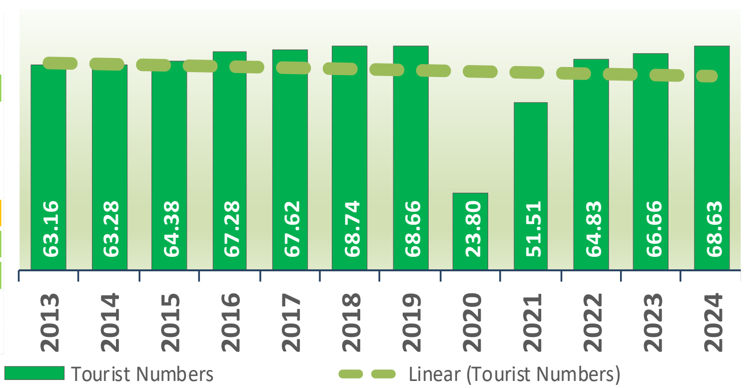
Visitor Numbers

There were an estimated 68.6m tourism visits to Lancashire in 2024, up by 3.0% from the previous year, and just fractionally down by -0.1% from estimated pre-covid levels reported in 2019.

In 2024, 7.5m visitors stayed in some sort of accommodation within the area. This sector saw a slight decrease of -1.6% when compared to the previous year and is still -8.1% below pre-covid levels. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a fractional decrease of -1.0% over the last year but is still below 2019 pre-covid levels. The larger non-serviced accommodation sector was down slightly by -4.8% on the previous year and is also slightly below pre-covid estimates. 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 not only up by 3.5% on the previous year, but that they are also slightly above pre-covid estimates by 1.0%, which has had a knock-on effect on total visitor numbers as a whole, as day visitors represent 89% of all visitor numbers to Lancashire.

Visitor Numbers - Total

% Change Year on Year	
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%
2024	3.0%



Key Figures: Visitor Numbers 2024

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	**M**	**3.608**	**1.340**	**2.562**	**7.510**	**61.118**	**68.628**
2023 (Millions)	M	3.644	1.407	2.580	7.631	59.028	66.659
Change 23/24 (%)	**%**	**-1.0**	**-4.8**	**-0.7**	**-1.6**	**+3.5**	**+3.0**
Share of Total (%)	%	5.3	2.0	3.7	10.9	89.1	100.0

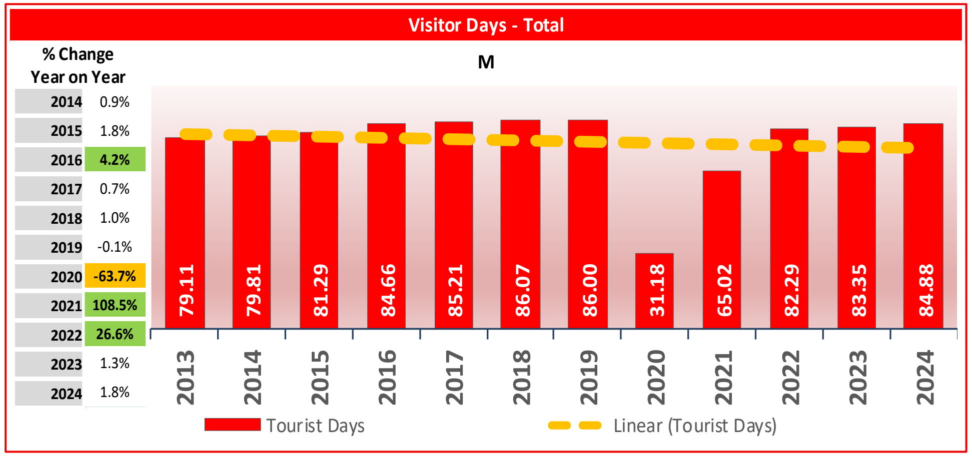
Total Visitor Days

84.9m

Visitor Days

Visitors spent an estimated 84.9m days in Lancashire 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 3.2 days.

Total staying visitors accounted for 23.8m visitor days in 2024, a slight decrease of -2.3% on the previous year, and still below 2019 pre-covid levels. The serviced accommodation sector decreased fractionally by -0.9% when compared to 2023, and it is still below pre-covid figures reported in 2019. The larger non-serviced accommodation sector was down -4.6% on the previous year and is also still below pre-covid 2019 levels. This points to both accommodation sectors lagging behind day visitors in terms of recovery, perhaps in part due to a reduction in establishments over the past years. As mentioned before, day visitors to the area are up by 3.5% on the previous year, a good result when compared to other areas, and especially given the predominance of the day visitor sector to Lancashire.



Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	**M**	**7.804**	**9.339**	**6.620**	**23.763**	**61.118**	**84.881**
2023 (Millions)	M	7.872	9.789	6.657	24.318	59.028	83.345
Change 23/24 (%)	**%**	**-0.9**	**-4.6**	**-0.6**	**-2.3**	**+3.5**	**+1.8**
Share of Total (%)	%	9.2	11.0	7.8	28.0	72.0	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	2.2	2.6	3.2	7.0

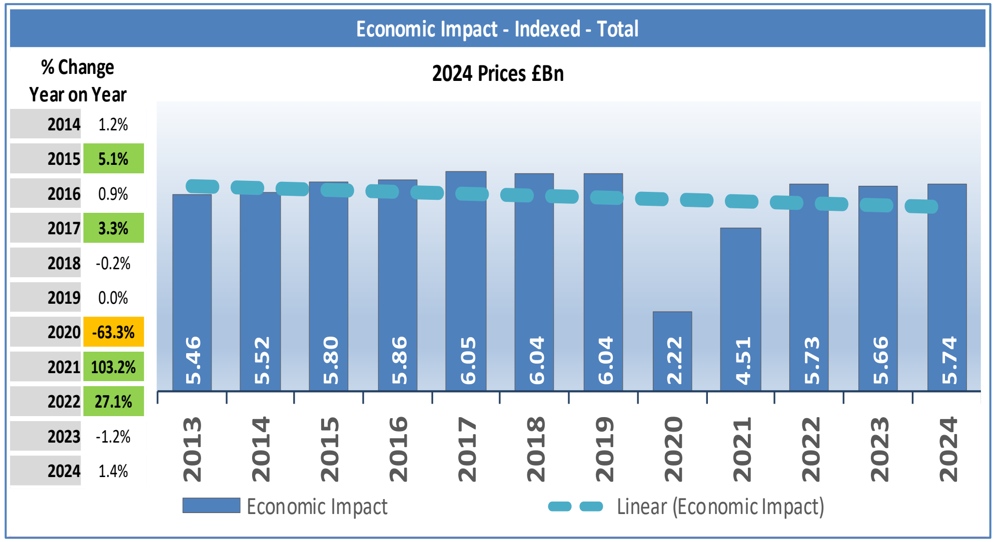
Total Economic Impact

£5.7bn

Economic Impact

The value of tourism activity in Lancashire was estimated to be £5.7bn in 2024, up by 1.4% on the previous year, but still -4.9% below estimates when compared to pre-covid levels (all figures are indexed for inflation).

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £4.33bn. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £1.41m, together totalling £5.7bn. The largest visitor spending sector was Shopping (£1.56bn), followed by Food & Drink (£1.44bn), then Transport (£525m) followed by Accommodation (£486m). The economic impact of the serviced sector was up by 1.2% on the previous year. The larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was down slightly -4.5% on 2023. In terms of comparison, the serviced sector has about 11,000 less bedspaces than the non-serviced sector, but has almost twice the economic impact. Day visitor economic impact is up 3.5% on the previous year and is now 1.0% above pre-covid levels when indexed for inflation; its economic impact is twice that of the serviced accommodation sector.



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

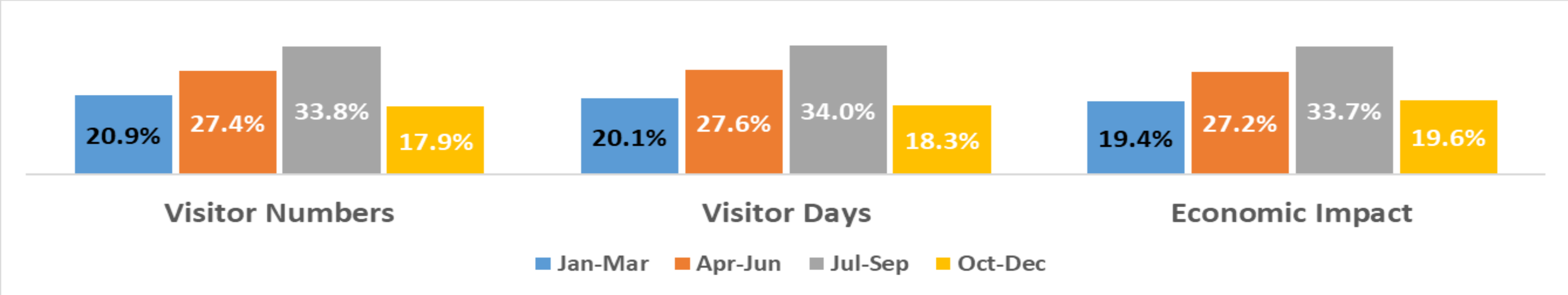
Key Figures: Economic Impact 2024 (Indexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Billions)	**£Bn**	**1.519**	**0.845**	**0.360**	**2.724**	**3.015**	**5.739**
2023 (£ Billions)	£Bn	1.502	0.880	0.360	2.750	2.910	5.660
Change 23/24 (%)	**%**	**+1.2**	**-4.5**	**-0.6**	**-0.9**	**+3.5**	**+1.4**
Share of Total (%)	%	26.5	14.7	6.3	47.5	52.5	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	**£ 194.69**	**£ 90.47**	**£ 54.40**	**£ 114.65**	**£ 49.33**	**£ 67.62**
Economic Impact per Visit	£ 421.08	£ 630.58	£ 140.56	£ 362.75	£ 49.33	£ 83.63

Seasonal Distribution of Key Visitor Metrics: 2024



Total FTEs Supported

57,068

Employment Supported by Tourism

The expenditure and activity of visitors to Lancashire supported a total of 57,068 Full-Time Equivalent jobs (FTEs) in 2024; a fractional decrease of -0.4% on the year before, and 4.2% below 2019 pre-covid levels.

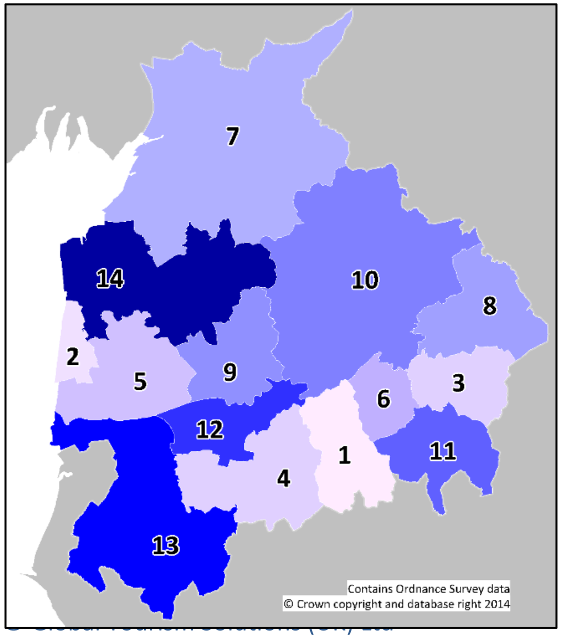
Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 45,885 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 11,183 FTEs. The Food & Drink sector is the largest employment sector supported by tourism activity, accounting for an estimated 14,671 FTEs, closely followed by Shopping at 14,570 FTEs, then Accommodation at 10,303 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	10,303	14,671	3,945	14,570	2,396	45,885	11,183	57,068

STEAM Key Impacts by Authority area: Marketing Lancashire

2024	Outputs by Area	Visitor Numbers			Economic Impact			Employment FTEs		
		Share	Total	% change	Share	Total	% change	Share	Total	% change
1	Blackburn with Darwen Borough Council	5.7%	3.74m	0.9%	4.4%	£250.7m	1.9%	4%	2,372	1.65%
2	Blackpool Council	33.9%	23.23m	7.7%	37.5%	£2150.2m	3.6%	41%	23,489	0.30%
3	Burnley Borough Council	3.3%	2.27m	0.0%	2.7%	£152.4m	-2.8%	2%	1,392	-5.22%
4	Chorley Borough Council	4.6%	3.17m	1.4%	3.8%	£216.6m	-0.4%	4%	2,017	-1.06%
5	Fylde Borough Council	4.8%	3.31m	3.8%	6.3%	£360.1m	-0.7%	6%	3,333	-0.81%
6	Hyndburn Borough Council	2.7%	1.82m	-0.4%	2.0%	£114.8m	-1.2%	2%	1,042	-2.40%
7	Lancaster City Council	10.4%	7.13m	2.3%	11.3%	£648.3m	3.5%	11%	6,257	2.31%
8	Borough of Pendle	3.6%	2.46m	-1.3%	2.8%	£158.0m	-2.4%	3%	1,529	-2.18%
9	Preston City Council	8.9%	6.10m	0.6%	7.7%	£443.3m	5.6%	7%	4,086	3.50%
10	Ribble Valley Borough Council	5.5%	3.77m	-1.6%	5.3%	£304.3m	-4.9%	5%	3,002	-5.42%
11	Rossendale Borough Council	1.8%	1.25m	-0.9%	1.3%	£76.1m	-1.2%	1%	698	-3.11%
12	South Ribble Borough Council	4.3%	2.98m	-1.4%	3.5%	£200.6m	-5.4%	3%	1,911	-6.10%
13	West Lancashire District Council	4.1%	2.81m	4.2%	4.0%	£230.2m	5.3%	4%	2,106	3.46%
14	Wyre Borough Council	6.4%	4.40m	-1.1%	7.6%	£433.7m	-3.4%	7%	3,835	-4.93%
	LANCASHIRE	100%	68.63m	3.0%	100%	£5739.5m	1.4%	100%	57,068	-0.43%



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: 2023 and 2024 (Indexed for inflation)

STEAM REPORT FOR 2013-2024 - FINAL	Comparing 2024 and 2023	COMPARATIVE HEADLINES
LANCASHIRE	2023 in 2024 prices (1.049)	

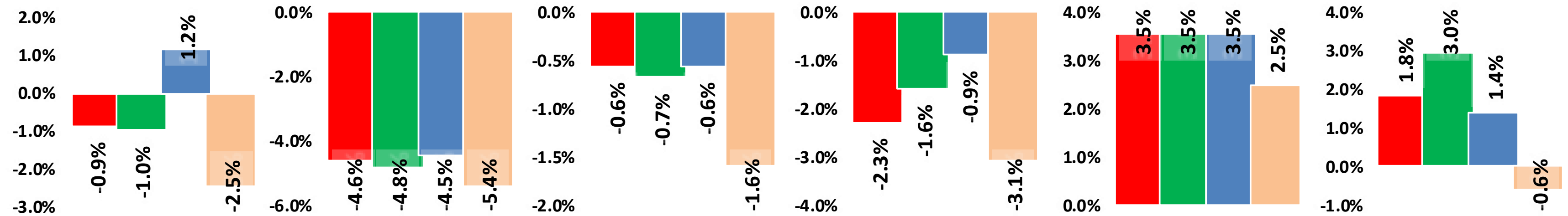
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - INDEXED TO 2024

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														
		2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %
Visitor Days	M	7.804	7.872	-0.9%	9.34	9.79	-4.6%	6.62	6.66	-0.6%	23.76	24.32	-2.3%	61.12	59.03	3.5%	84.88	83.35	1.8%
Visitor Numbers	M	3.608	3.644	-1.0%	1.34	1.41	-4.8%	2.56	2.58	-0.7%	7.51	7.63	-1.6%	61.12	59.03	3.5%	68.63	66.66	3.0%
Direct Expenditure	£Bn																4.33	4.27	1.4%
Economic Impact	£Bn	1.519	1.502	1.2%	0.84	0.88	-4.5%	0.36	0.36	-0.6%	2.72	2.75	-0.9%	3.02	2.91	3.5%	5.74	5.66	1.4%
Direct Employment	FTEs	16,812	17,241	-2.5%	5,571	5,889	-5.4%	2,498	2,538	-1.6%	24,881	25,667	-3.1%	21,004	20,496	2.5%	45,885	46,163	-0.6%
Total Employment	FTEs																57,068	57,311	-0.4%

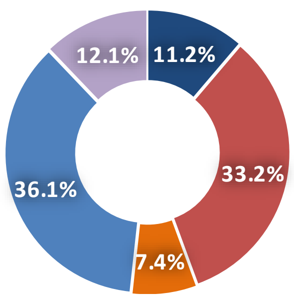
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - INDEXED TO 2024

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

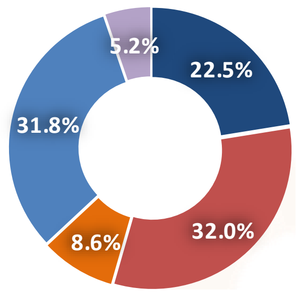


Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2024 | **Sectoral Distribution of Employment - FTEs**

Sectors	Economic Impact 2024	2023	+/- %	Employment 2024	2023	+/- %
Accommodation	0.49	0.47	3.7%	10,303	10,627	-3.1%
Food & Drink	1.44	1.42	1.3%	14,671	14,637	0.2%
Recreation	0.32	0.32	0.6%	3,945	3,961	-0.4%
Shopping	1.56	1.54	1.3%	14,570	14,526	0.3%
Transport	0.52	0.52	0.3%	2,396	2,412	-0.7%
TOTAL DIRECT	4.33	4.27	1.4%	45,885	46,163	-0.6%
Indirect	1.41	1.39	1.4%	11,183	11,148	0.3%
TOTAL	5.74	5.66	1.4%	57,068	57,311	-0.4%



Direct Expenditure Categories



Direct Employment Categories

STEAM Comparative Headlines: 2019 and 2024 Covid Recovery (Indexed for inflation)

STEAM REPORT FOR 2013-2024 - FINAL LANCASHIRE	Comparing 2024 and 2019 2019 in 2024 prices (1.336)	COMPARATIVE HEADLINES

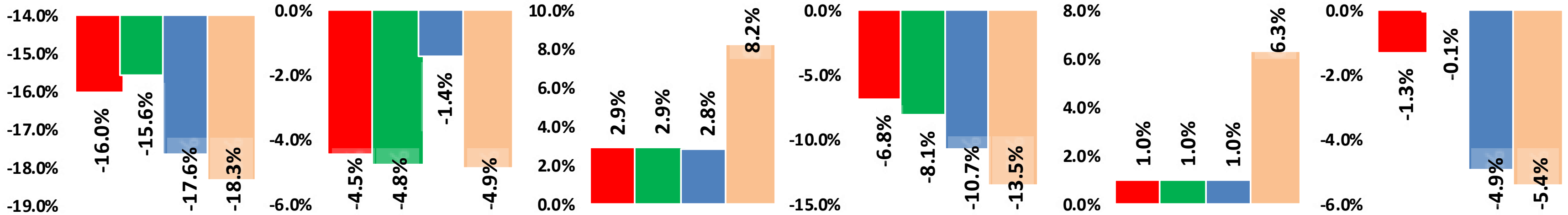
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2019 - INDEXED TO 2024

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														
		2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %
Visitor Days	M	7.804	9.293	-16.0%	9.34	9.77	-4.5%	6.62	6.43	2.9%	23.76	25.50	-6.8%	61.12	60.49	1.0%	84.88	86.00	-1.3%
Visitor Numbers	M	3.608	4.274	-15.6%	1.34	1.41	-4.8%	2.56	2.49	2.9%	7.51	8.17	-8.1%	61.12	60.49	1.0%	68.63	68.66	-0.1%
Direct Expenditure	£Bn																4.33	4.57	-5.2%
Economic Impact	£Bn	1.519	1.845	-17.6%	0.84	0.86	-1.4%	0.36	0.35	2.8%	2.72	3.05	-10.7%	3.02	2.99	1.0%	5.74	6.04	-4.9%
Direct Employment	FTEs	16,812	20,590	-18.3%	5,571	5,858	-4.9%	2,498	2,307	8.2%	24,881	28,755	-13.5%	21,004	19,760	6.3%	45,885	48,515	-5.4%
Total Employment	FTEs																57,068	59,596	-4.2%

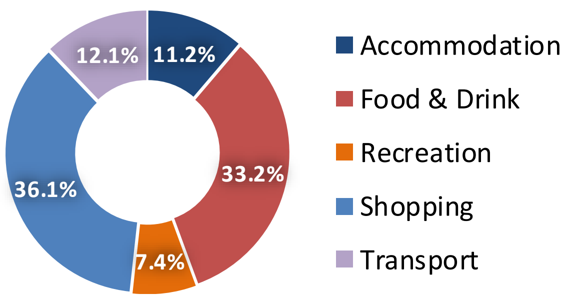
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2019 - INDEXED TO 2024

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

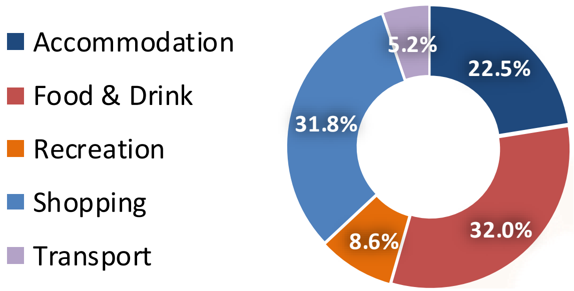


Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2024 / Sectoral Distribution of Employment - FTEs

Sectors	2024 (£Bn)	2019 (£Bn)	+/- %	2024 (FTEs)	2019 (FTEs)	+/- %
Accommodation	0.49	0.56	-13.1%	10,303	13,307	-22.6%
Food & Drink	1.44	1.48	-3.3%	14,671	14,409	1.8%
Recreation	0.32	0.34	-5.5%	3,945	3,967	-0.6%
Shopping	1.56	1.63	-4.0%	14,570	14,417	1.1%
Transport	0.52	0.56	-5.8%	2,396	2,416	-0.8%
TOTAL DIRECT	4.33	4.57	-5.2%	45,885	48,515	-5.4%
Indirect	1.41	1.47	-4.1%	11,183	11,081	0.9%
TOTAL	5.74	6.04	-4.9%	57,068	59,596	-4.2%



Direct Expenditure Categories



Direct Employment Categories