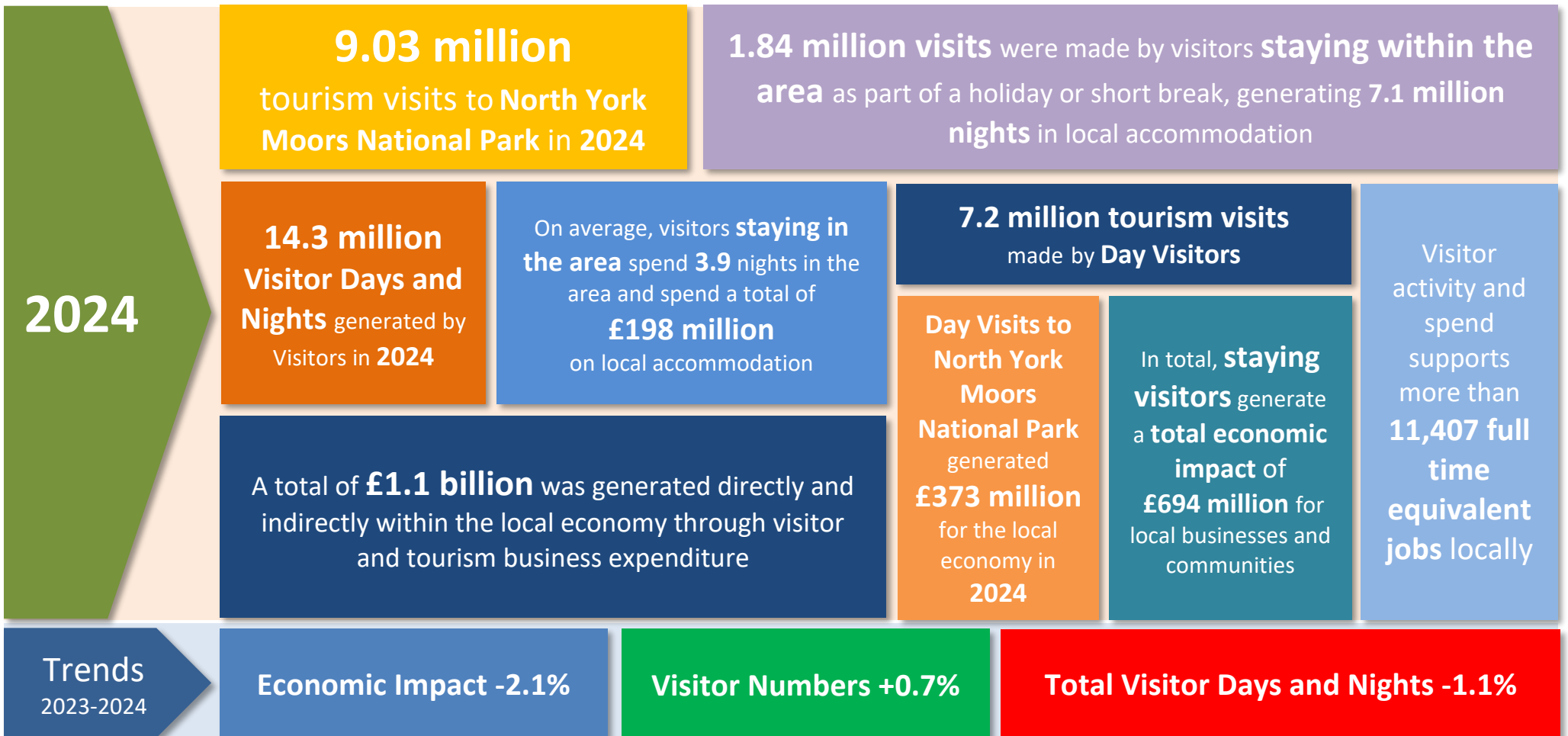


The Visitor Economy of North York Moors National Park

This is a summary of the annual tourism economic impact research undertaken for North York Moors National Park for the calendar years 2016-2024. 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

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

20% of Visits

Day Visitors

80% of Visits

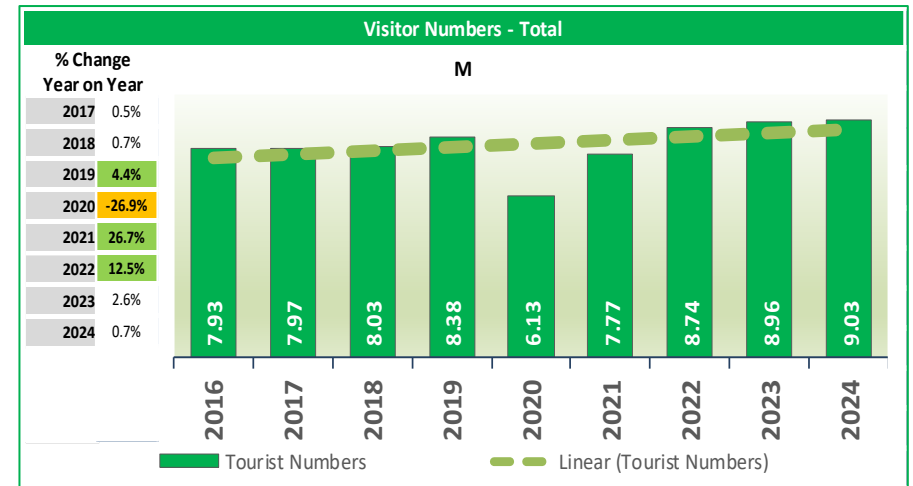
Total Visitor Numbers
9.03m

Visitor Numbers

There were an estimated 9.03m tourism visits to North York Moors National Park in 2024, slightly up by 0.7% from the previous year. Overall numbers are up 7.7% from estimated pre-covid levels in 2019, mainly due to non-serviced accommodation and day visitor numbers.

In 2024, 1.84m visitors stayed in some sort of accommodation within the area. This sector saw a slight decrease of -2.3% when compared to the previous year, but it is 8.1% above 2019 levels. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a fractional decrease of -0.4%, and is still -4.1% below 2019 estimates. This

is due in part to closures throughout the accommodation sector. The much larger non-serviced accommodation sector was down slightly by -4.0% on the previous year but it is now 22.9% above 2019 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 slightly up by 1.5% on the previous year, and that they are above 2019 estimates by 7.6%, which has had a positive knock-on effect on total visitor numbers as a whole, as day visitors represent 80% of all visitor numbers.



Key Figures: Visitor Numbers 2024

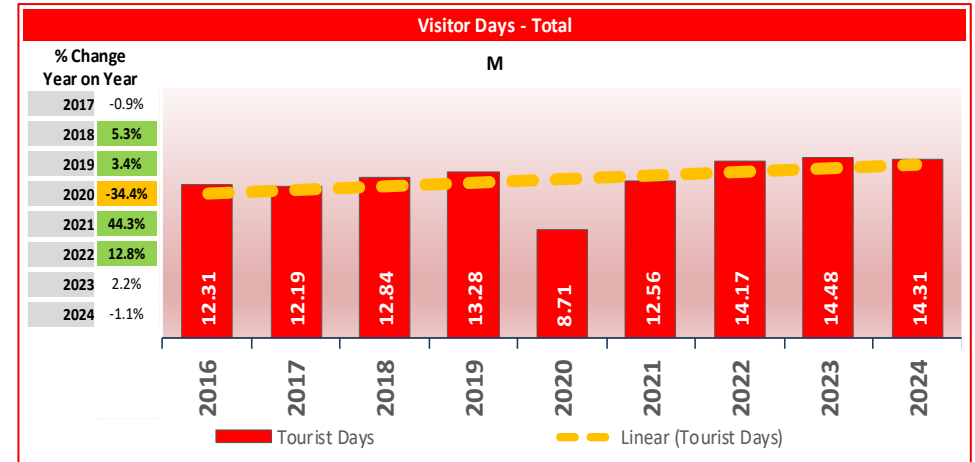
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.870	0.941	0.033	1.844	7.185	9.029
2023 (Millions)	M	0.874	0.981	0.033	1.888	7.077	8.965
Change 23/24 (%)	%	-0.4	-4.0	-1.7	-2.3	+1.5	+0.7
Share of Total (%)	%	9.6	10.4	0.4	20.4	79.6	100.0

**Total
Visitor
Days
14.3m**

Visitor Days

Visitors spent an estimated 14.3m days in North York Moors National Park 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 3.9 days, which is high when compared to other areas.

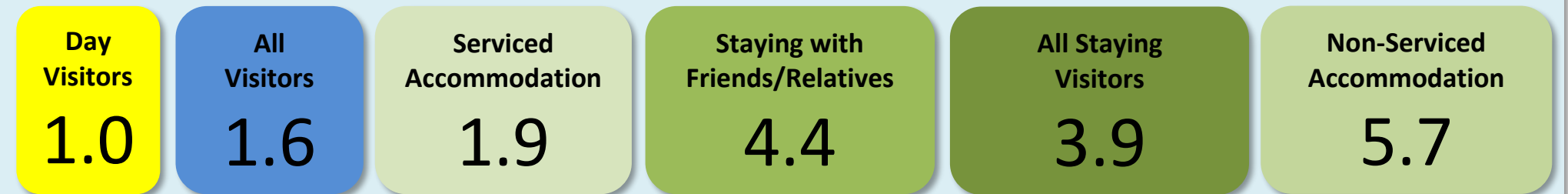
Total staying visitors accounted for 7.1m visitor days in 2024, a slight decrease of -3.7% on the previous year, but 8.0% above 2019 estimates. The serviced accommodation sector decreased fractionally by -0.5% when compared to 2023, and is -4.2% below figures reported in 2019. The larger non-serviced accommodation sector was also marginally down by -4.7% on the previous year but is 12.7% above 2019 levels. This drop in visitor days is a pattern seen throughout the UK, and we attribute it to shorter stays due to the current economic climate. As mentioned before, day visitors to the area were up 1.5% on the previous year, and up 7.6% on 2019, a good result when compared to other areas, and especially given the predominance of the day visitor sector to the North York Moors National Park.



Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	1.670	5.317	0.143	7.129	7.185	14.315
2023 (Millions)	M	1.678	5.580	0.145	7.404	7.077	14.480
Change 23/24 (%)	%	-0.5	-4.7	-1.4	-3.7	+1.5	-1.1
Share of Total (%)	%	11.7	37.1	1.0	49.8	50.2	100.0

Average Length of Stay for Different Visitor Types: 2024



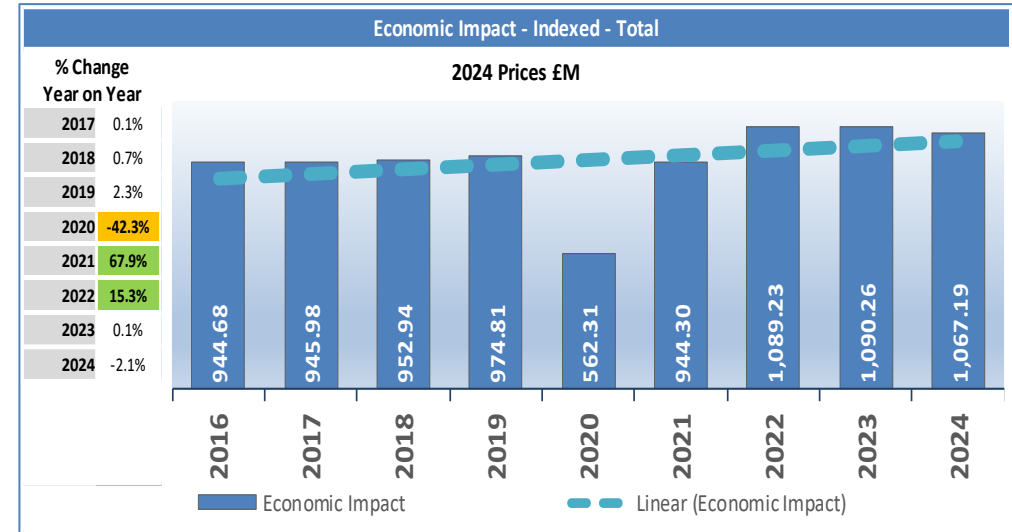
**Total
Economic
Impact
£1.07bn**

Economic Impact

The value of tourism activity in North York Moors National Park was estimated to be £1.07bn in 2024, slightly down by -2.1% on the previous year, but up by 9.5% when compared to 2019 estimates (all monetary figures have been indexed for inflation).

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £797m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £270m, together totalling £1.07bn. The largest

visitor spending sector was Shopping (£232m), then Accommodation (£198m), followed closely by Food & Drink (£193m), and then Transport (£101m). The economic impact of the serviced accommodation sector was down slightly by -2.3% on the previous year. The much larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was also down by -4.8% on 2023. In terms of comparison, the non-serviced sector has over four times more bedspaces than the serviced sector and has over twice the economic impact. Day visitor economic impact is up 1.5% on the previous year and is now 7.6% above 2019 levels when indexed for inflation; its economic impact is higher than the serviced accommodation sector, but less than the non-serviced 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

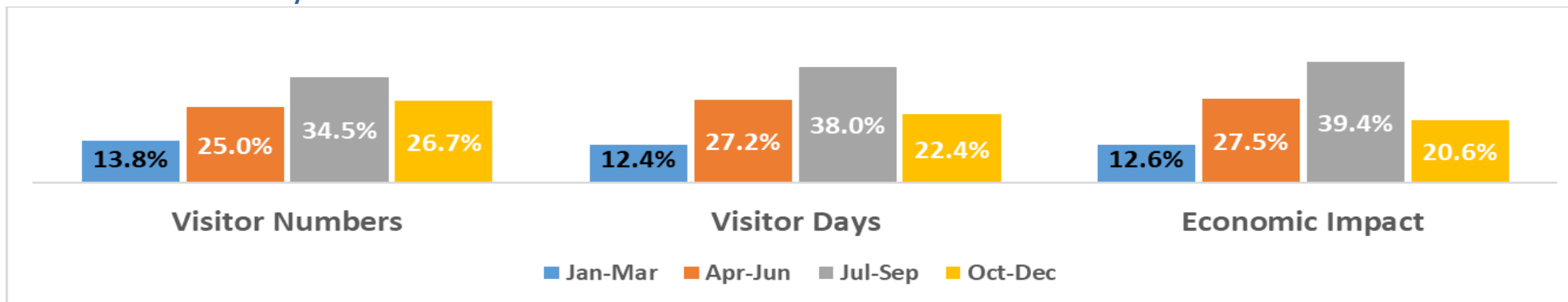
Key Figures: Economic Impact 2024 (Indexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Billions)	£Bn	0.220	0.464	0.010	0.694	0.373	1.067
2023 (£ Billions)	£Bn	0.225	0.488	0.010	0.723	0.368	1.090
Change 23/24 (%)	%	-2.3	-4.8	-1.4	-4.0	+1.5	-2.1
Share of Total (%)	%	20.6	43.5	0.9	65.0	35.0	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	£ 131.61	£ 87.32	£ 68.60	£ 97.32	£ 51.97	£ 74.55
Economic Impact per Visit	£ 252.63	£ 493.16	£ 299.82	£ 376.26	£ 51.97	£ 118.19

Seasonal Distribution of Key Visitor Metrics: 2024



**Total
FTEs
Supported
11,407**

Employment Supported by Tourism

The expenditure and activity of visitors to North York Moors National Park supported a total of 11,407 Full-Time Equivalent jobs (FTEs) in 2024; a slight decrease of -2.4% on the year before.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 9,269 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 2,138 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 3,768 FTEs, followed by Shopping at 2,158 FTEs, followed closely by Food & Drink at 1,973 FTEs, and by Recreation at 907 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	3,768	1,973	907	2,158	462	9,269	2,138	11,407

STEAM Comparative Headlines: 2023 and 2024 (Indexed for inflation)

STEAM REPORT FOR 2016-2024 - FINAL
NORTH YORK MOORS NATIONAL PARK AUTHORITY

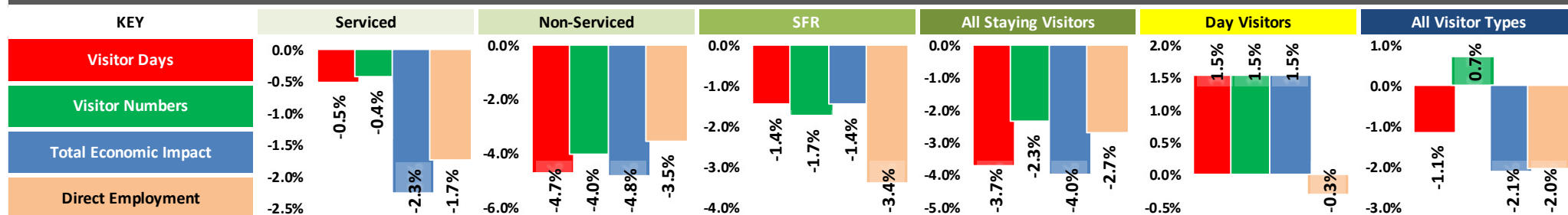
Comparing 2024 and 2023
2023 in 2024 prices (1.049)

COMPARATIVE HEADLINES

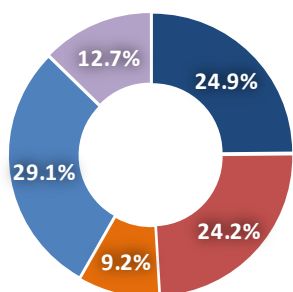
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - INDEXED TO 2024

KEY	KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - INDEXED TO 2024																	
	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	1.670	1.678	-0.5%	5.317	5.580	-4.7%	0.143	0.145	-1.4%	7.129	7.404	-3.7%	7.185	7.077	1.5%	14.31	14.48	-1.1%
Visitor Numbers M	0.870	0.874	-0.4%	0.941	0.981	-4.0%	0.033	0.033	-1.7%	1.844	1.888	-2.3%	7.185	7.077	1.5%	9.029	8.965	0.7%
Direct Expenditure £Bn																0.797	0.814	-2.0%
Economic Impact £Bn	0.220	0.225	-2.3%	0.464	0.488	-4.8%	0.010	0.010	-1.4%	0.694	0.723	-4.0%	0.373	0.368	1.5%	1.067	1.090	-2.1%
Direct Employment FTEs	3,235	3,292	-1.7%	3,421	3,547	-3.5%	68	70	-3.4%	6,724	6,909	-2.7%	2,545	2,552	-0.3%	9,269	9,461	-2.0%
Total Employment FTEs																11,407	11,682	-2.4%

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



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



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

Direct Expenditure Categories

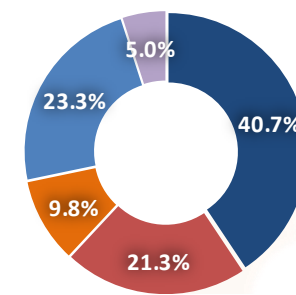
	2024	2023	+/- %
Accommodation	0.198	0.208	-4.6%
Food & Drink	0.193	0.196	-1.5%
Recreation	0.073	0.074	-1.3%
Shopping	0.232	0.233	-0.7%
Transport	0.101	0.103	-1.3%
TOTAL DIRECT	0.797	0.814	-2.0%
Indirect	0.270	0.277	-2.4%
TOTAL	1.067	1.090	-2.1%

Sectors

Sectors	2024	2023	+/- %
Accommodation	3,768	3,807	-1.0%
Food & Drink	1,973	2,056	-4.0%
Recreation	907	929	-2.3%
Shopping	2,158	2,196	-1.7%
Transport	462	473	-2.3%
TOTAL DIRECT	9,269	9,461	-2.0%
Indirect	2,138	2,221	-3.7%
TOTAL	11,407	11,682	-2.4%

Sectoral Distribution of Employment - FTEs

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



Direct Employment Categories

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

STEAM REPORT FOR 2016-2024 - FINAL

Comparing 2024 and 2019

COMPARATIVE HEADLINES

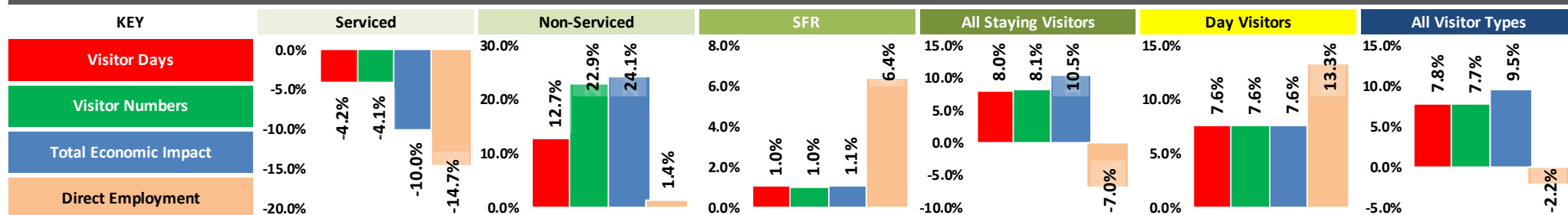
NORTH YORK MOORS NATIONAL PARK AUTHORITY

2019 in 2024 prices (1.336)

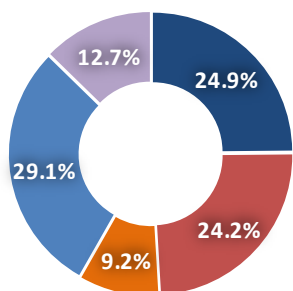
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2019 - INDEXED TO 2024

KEY	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	1.670	1.742	-4.2%	5.317	4.716	12.7%	0.143	0.141	1.0%	7.129	6.600	8.0%	7.185	6.676	7.6%	14.31	13.28	7.8%		
Visitor Numbers	M	0.870	0.907	-4.1%	0.941	0.766	22.9%	0.033	0.032	1.0%	1.844	1.705	8.1%	7.185	6.676	7.6%	9.029	8.382	7.7%		
Direct Expenditure	£Bn																0.797	0.734	8.7%		
Economic Impact	£Bn	0.220	0.244	-10.0%	0.464	0.374	24.1%	0.010	0.010	1.1%	0.694	0.628	10.5%	0.373	0.347	7.6%	1.067	0.975	9.5%		
Direct Employment	FTEs	3,235	3,791	-14.7%	3,421	3,374	1.4%	68	64	6.4%	6,724	7,228	-7.0%	2,545	2,246	13.3%	9,269	9,474	-2.2%		
Total Employment	FTEs																11,407	11,290	1.0%		

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



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



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

Direct Expenditure Categories

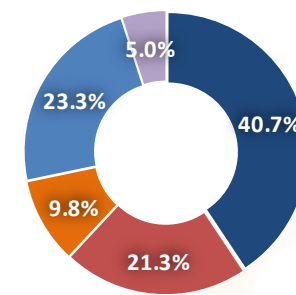
	2024	2019	+/- %
Accommodation	0.198	0.171	15.6%
Food & Drink	0.193	0.181	6.8%
Recreation	0.073	0.069	6.3%
Shopping	0.232	0.217	7.0%
Transport	0.101	0.096	5.6%
TOTAL DIRECT	0.797	0.734	8.7%
Indirect	0.270	0.241	11.9%
TOTAL	1.067	0.975	9.5%

Sectors

Sectors	2024	2019	+/- %
Accommodation	3,768	4,574	-17.6%
Food & Drink	1,973	1,756	12.4%
Recreation	907	811	11.9%
Shopping	2,158	1,917	12.6%
Transport	462	416	11.1%
TOTAL DIRECT	9,269	9,474	-2.2%
Indirect	2,138	1,816	17.7%
TOTAL	11,407	11,290	1.0%

Sectoral Distribution of Employment - FTEs

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



Direct Employment Categories