

The Visitor Economy of North York Moors National Park

This is a summary of the annual tourism economic impact research undertaken for the North York Moors National Park National Park for the calendar years 2016-2023. 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 2023 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.



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

21% of Visits

Day Visitors

79% of Visits

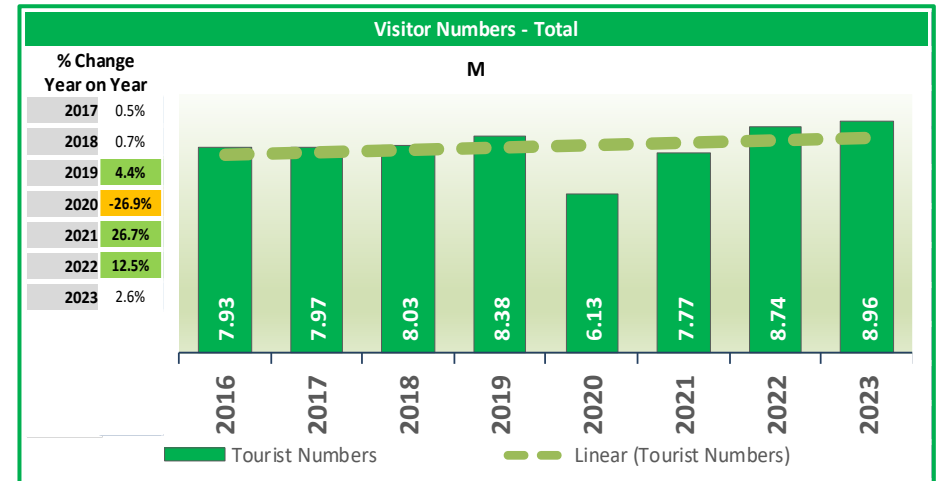
**Total
Visitor
Numbers
8.97m**

Visitor Numbers

There were an estimated 8.97m tourism visits to the North York Moors National Park in 2023, up 2.6% from the previous year, and up 7.0% from estimated pre-covid levels reported in 2019.

In 2023, 1.89m visitors stayed in some sort of accommodation within the area. This sector saw an increase of 2.3% when compared to the previous year, and a 10.7% increase on 2019. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a fractional decline of -1.5% over the last year and is just slightly under 2019 pre-

covid levels by -3.7%. Serviced accommodation supply has decreased within the area in the aftermath of covid, which will act to damped down the National Park’s recovery in this sector post covid. In contrast, the non-serviced accommodation sector continues to recover steadily, gaining 6.1% on the previous year, and is now 28.1% above pre-covid 2019 figures. Day visitors throughout many locations in the UK are still below pre-covid levels, especially in rural and semi-rural locations, so it is very encouraging to see day visitor numbers up 2.7% on 2022, and up 6.0% on pre-covid estimates in 2019.



Key Figures: Visitor Numbers 2023

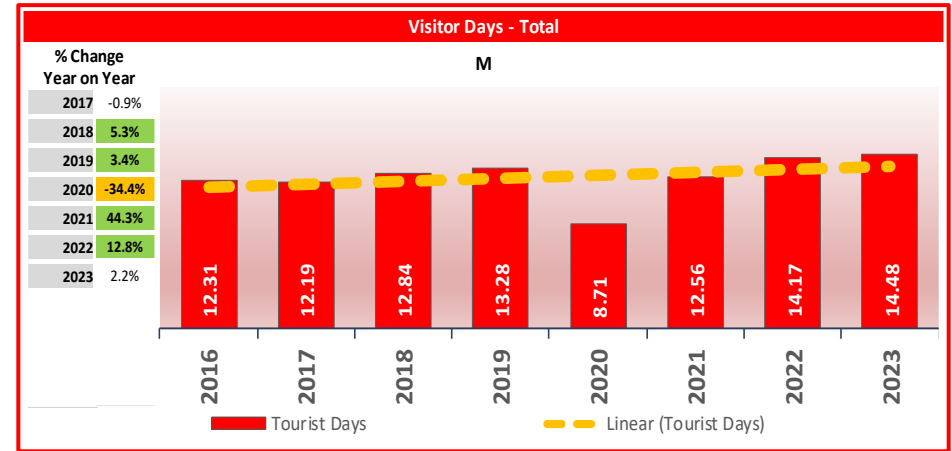
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	M	0.874	0.981	0.033	1.888	7.077	8.965
2022 (Millions)	M	0.887	0.925	0.034	1.846	6.893	8.739
Change 22/23 (%)	%	-1.5	+6.1	-2.0	+2.3	+2.7	+2.6
Share of Total (%)	%	9.7	10.9	0.4	21.1	78.9	100.0

**Total
Visitor
Days
14.5m**

Visitor Days

Visitors spent an estimated 14.5m days in the North York Moors National Park during 2023. 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 Park stay 3.9 days in the area.

It has been a relatively stable year for visitor days in the Park. Total staying visitors accounted for 7.40m visitor days in 2023, a slight increase of 1.7% on the previous year, and a larger increase of 12.2% on 2019, driven largely by the non-serviced accommodation sector. The serviced accommodation sector decreased fractionally by -0.8% compared to 2022, and as with visitor numbers, is now just -3.7% below pre-covid figures reported in 2019. Meanwhile the much larger non-serviced accommodation sector within the Park is up 2.6% on the previous year, and is also up 18.3% on 2019. As mentioned before, day visitors to the Park are not only slightly up by 2.7% on the previous year, but they buck the overall slow recovery trend seen in other rural and semi-rural areas in the UK by surpassing estimated pre-covid level by 6.0%.



Key Figures: Visitor Days 2023

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	M	1.678	5.580	0.145	7.404	7.077	14.480
2022 (Millions)	M	1.693	5.437	0.147	7.277	6.893	14.170
Change 22/23 (%)	%	-0.8	+2.6	-1.9	+1.7	+2.7	+2.2
Share of Total (%)	%	11.6	38.5	1.0	51.1	48.9	100.0

Average Length of Stay for Different Visitor Types: 2023

Day
Visitors
1.0

All
Visitors
1.6

Serviced
Accommodation
1.9

Staying with
Friends/Relatives
4.4

All Staying
Visitors
3.9

Non-Serviced
Accommodation
5.7

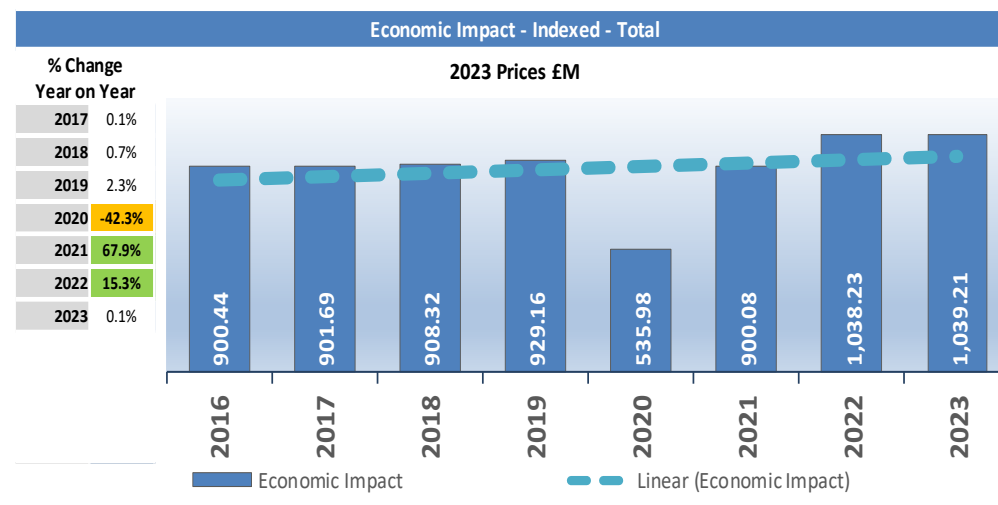
**Total
Economic
Impact
£1.04bn**

Economic Impact

The value of tourism activity in the North York Moors National Park was estimated to be £1.04bn in 2023, up just fractionally by 0.1%, but enough to see the Park surpass the one billion mark for the very first time (2022 results have exceeded one billion only due to indexation).

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £776m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £264m, together totalling £1.04bn. The

largest visitor spending sector was Shopping (£222m), followed by Accommodation (£198m), and Food & Drink (£187m). The economic impact of the serviced sector was down -5.9% on the previous year, reflecting slight decreases in visitor numbers and visitor days, and is still -7.9% down on estimated 2019 pre-covid levels. The Park's large non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was slightly up by 1.2% on 2022, but since 2019 has increased by 30.4%. In terms of comparison, the non-serviced sector has over four times the bedspaces of the serviced sector, and twice the economic impact. Day visitors to the Park are up 2.7% on the previous year, and are now 6.0% above 2019 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

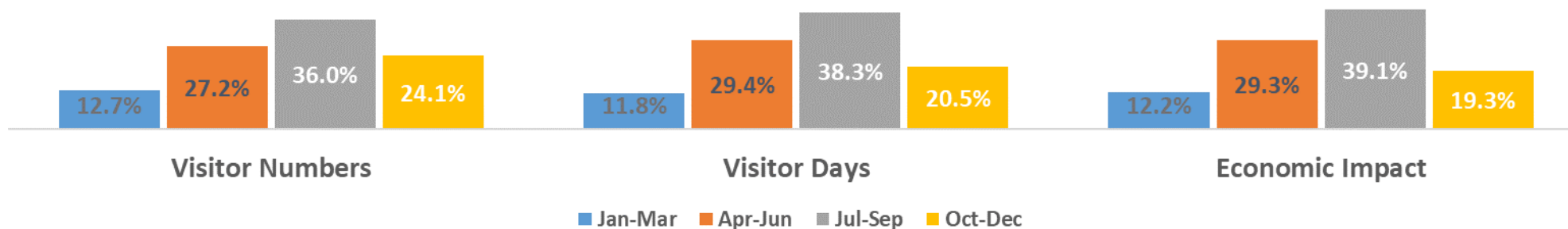
Key Figures: Economic Impact 2023 (Indexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (£ Billions)	£Bn	0.214	0.465	0.009	0.689	0.351	1.039
2022 (£ Billions)	£Bn	0.228	0.459	0.010	0.697	0.341	1.038
Change 22/23 (%)	%	-5.9	+1.2	-1.9	-1.2	+2.7	+0.1
Share of Total (%)	%	20.6	44.7	0.9	66.3	33.7	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	£127.70	£83.31	£65.39	£93.02	£49.53	£71.77
Economic Impact per Visit	£245.31	£473.89	£284.93	£364.78	£49.53	£115.92

Seasonal Distribution of Key Visitor Metrics: 2023



**Total
FTEs
Supported
11,682**

Employment Supported by Tourism

The expenditure and activity of visitors to the North York Moors National Park supported a total of 11,682 Full-Time Equivalent jobs (FTEs) in 2023; an increase of 5.5% on the year before, and now 3.5% above 2019 pre-covid levels for the first time.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 9,461 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 2,221 FTEs. The accommodation sector is the largest employment sector supported by tourism activity, accounting for an estimated 3,807 FTEs, followed by Shopping at 2,196 FTEs and Food & Drink at 2,056 FTEs.

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	3,807	2,056	929	2,196	473	9,461	2,221	11,682

STEAM Comparative Headlines: 2022 and 2023 (Indexed)

STEAM REPORT FOR 2016-2023 - FINAL

Comparing 2023 and 2022

COMPARATIVE HEADLINES

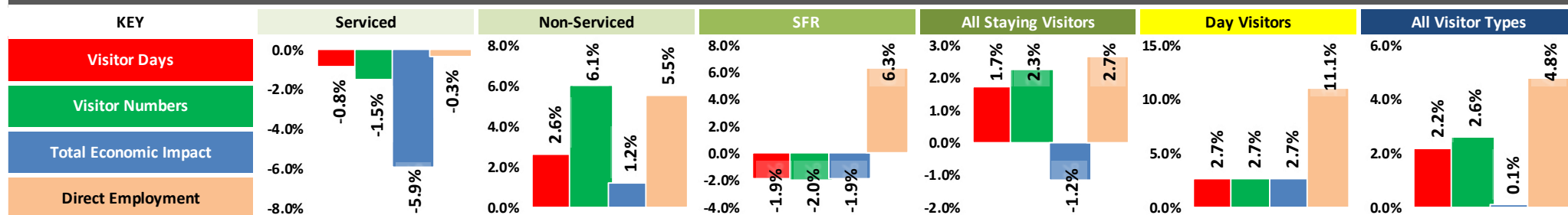
NORTH YORK MOORS NATIONAL PARK AUTHORITY

2022 in 2023 prices (1.134)

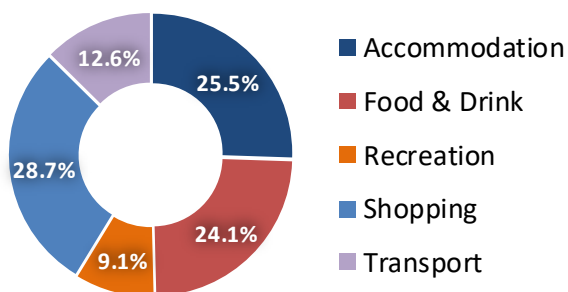
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2022 - INDEXED TO 2023

KEY	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	+/- %			
An increase of 3% or more																					
Less than 3% change																					
A Fall of 3% or more																					
Visitor Days	M	1.678	1.693	-0.8%	5.580	5.437	2.6%	0.145	0.147	-1.9%	7.404	7.277	1.7%	7.077	6.893	2.7%	14.48	14.17	2.2%		
Visitor Numbers	M	0.874	0.887	-1.5%	0.981	0.925	6.1%	0.033	0.034	-2.0%	1.888	1.846	2.3%	7.077	6.893	2.7%	8.965	8.739	2.6%		
Direct Expenditure	£Bn																0.776	0.776	-0.1%		
Economic Impact	£Bn	0.214	0.228	-5.9%	0.465	0.459	1.2%	0.009	0.010	-1.9%	0.689	0.697	-1.2%	0.351	0.341	2.7%	1.039	1.038	0.1%		
Direct Employment	FTEs	3,292	3,303	-0.3%	3,547	3,361	5.5%	70	66	6.3%	6,909	6,729	2.7%	2,552	2,297	11.1%	9,461	9,027	4.8%		
Total Employment	FTEs																11,682	11,076	5.5%		

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



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



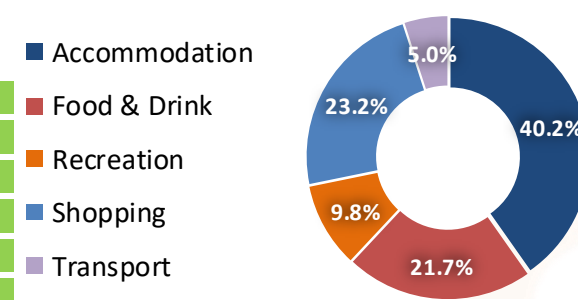
Direct Expenditure Categories

	2023	2022	+/- %
Accommodation	0.198	0.209	-5.5%
Food & Drink	0.187	0.183	2.0%
Recreation	0.071	0.069	2.0%
Shopping	0.222	0.218	1.8%
Transport	0.098	0.096	1.9%
TOTAL	0.776	0.776	-0.1%
Indirect	0.264	0.262	0.6%
TOTAL	1.039	1.038	0.1%

Sectors

	2023	2022	+/- %
Accommodation	3,807	3,889	-2.1%
Food & Drink	2,056	1,848	11.3%
Recreation	929	848	9.5%
Shopping	2,196	2,009	9.3%
Transport	473	432	9.4%
TOTAL DIRECT	9,461	9,027	4.8%
Indirect	2,221	2,049	8.4%
TOTAL	11,682	11,076	5.5%

Sectoral Distribution of Employment - FTEs



Direct Employment Categories

STEAM Comparative Headlines: 2019 and 2023 Covid Recovery (Indexed)

STEAM REPORT FOR 2016-2023 - FINAL

Comparing 2023 and 2019

COMPARATIVE HEADLINES

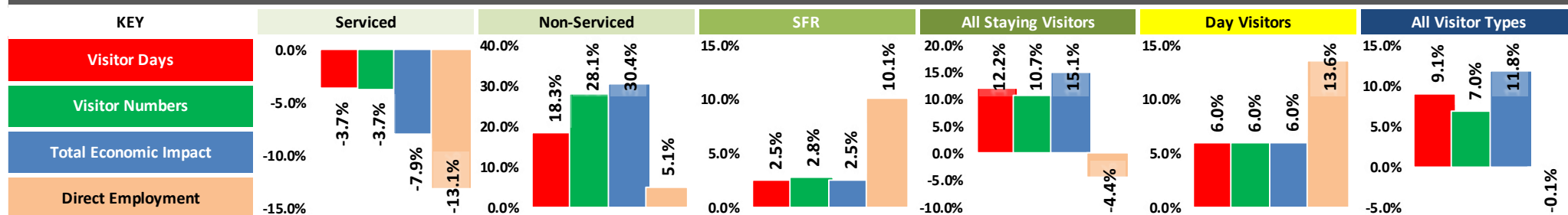
NORTH YORK MOORS NATIONAL PARK AUTHORITY

2019 in 2023 prices (1.273)

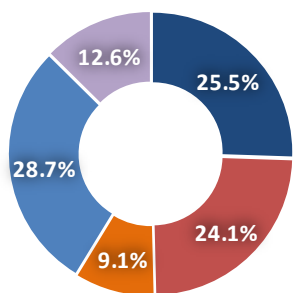
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2019 - INDEXED TO 2023

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %			
Visitor Days	M	1.678	1.742	-3.7%	5.580	4.716	18.3%	0.145	0.141	2.5%	7.404	6.600	12.2%	7.077	6.676	6.0%	14.48	13.28	9.1%		
Visitor Numbers	M	0.874	0.907	-3.7%	0.981	0.766	28.1%	0.033	0.032	2.8%	1.888	1.705	10.7%	7.077	6.676	6.0%	8.965	8.382	7.0%		
Direct Expenditure	£Bn																0.776	0.699	10.9%		
Economic Impact	£Bn	0.214	0.233	-7.9%	0.465	0.357	30.4%	0.009	0.009	2.5%	0.689	0.599	15.1%	0.351	0.331	6.0%	1.039	0.929	11.8%		
Direct Employment	FTEs	3,292	3,791	-13.1%	3,547	3,374	5.1%	70	64	10.1%	6,909	7,228	-4.4%	2,552	2,246	13.6%	9,461	9,474	-0.1%		
Total Employment	FTEs																11,682	11,290	3.5%		

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2023 & 2019 - INDEXED TO 2023



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



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

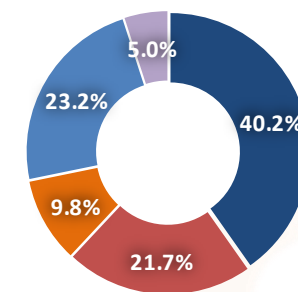
Direct Expenditure Categories

	2023	2019	+/- %
Accommodation	0.198	0.163	21.2%
Food & Drink	0.187	0.172	8.4%
Recreation	0.071	0.066	7.7%
Shopping	0.222	0.206	7.7%
Transport	0.098	0.091	7.0%
TOTAL DIRECT	0.776	0.699	10.9%
Indirect	0.264	0.230	14.7%
TOTAL	1.039	0.929	11.8%

Sectors

	2023	2019	+/- %
Accommodation	3,807	4,574	-16.8%
Food & Drink	2,056	1,756	17.1%
Recreation	929	811	14.5%
Shopping	2,196	1,917	14.6%
Transport	473	416	13.8%
TOTAL DIRECT	9,461	9,474	-0.1%
Indirect	2,221	1,816	22.3%
TOTAL	11,682	11,290	3.5%

Sectoral Distribution of Employment - FTEs



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

Direct Employment Categories

