

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 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.

2022

**8.7 million Tourism
Visits to the North York Moors
National Park in 2022**

1.85 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **7.3 million nights** in local accommodation

**14.2 million
Visitor Days and
Nights** generated by
Visitors in 2022

On average, visitors **staying in the area** spend **3.9** nights in the area and spend a total of **£185 million** on local accommodation

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

Day Visits to the North York Moors National Park generated **£301 million** for the local economy in 2022

In total, **staying visitors** generate a **total economic impact of £614 million** for local businesses and communities

Visitor activity and spend supports more than **11,076 full time equivalent jobs** locally

A total of **£915.5 million** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

**Trends
2019-2022**

Economic Impact +11.7%

Visitor Numbers +4.3%

Total Visitor Days and Nights +6.7%

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

21.1 of Visits

Day Visitors

78.9% of Visits

**Total
Visitor
Numbers
8.74m**

Visitor Numbers

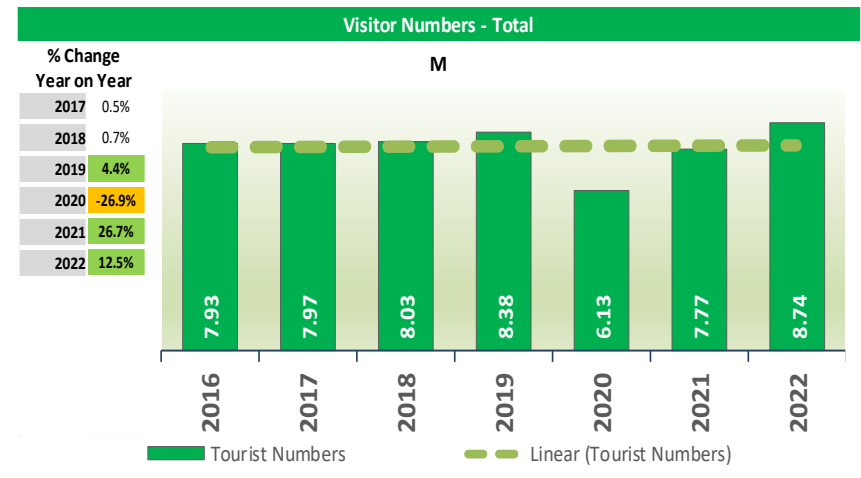
There were an estimated 8.74m tourism visits to the North York Moors National Park in 2022. Between 2016 and 2019 the National Park had seen the total number of visits by rise by 5.7% to a pre-covid total of 8.38m, so visitor numbers in 2022 surpassed pre-covid levels for the first time since the pandemic began to influence tourism performance.

In 2022, 1.85m visitors stayed in some sort of accommodation within the area. This sector, as a whole, saw an increase of 17.9% compared to 2021, this continues the steady recovery we saw last year, and the sector is now 8.3% above pre-covid 2019 figures.

Serviced accommodation increased by 20.5% over the last year and

is now only -2.2% below pre-covid levels. Serviced accommodation supply has decreased in the aftermath of covid, which will act to damped down the National Park's recovery post covid. The non-serviced accommodation sector also continues a rapid recovery, gaining 15.8% last year, and is now 20.8% above pre-covid figures, influenced in part by the inclusion of Airbnb data.

The National Park's staying visitor numbers have recovered past pre-covid levels, and so has the day visitor sector. Growing by 11.1% in 2022, it is now 3.2% above pre-covid levels.



Key Figures: Visitor Numbers 2022

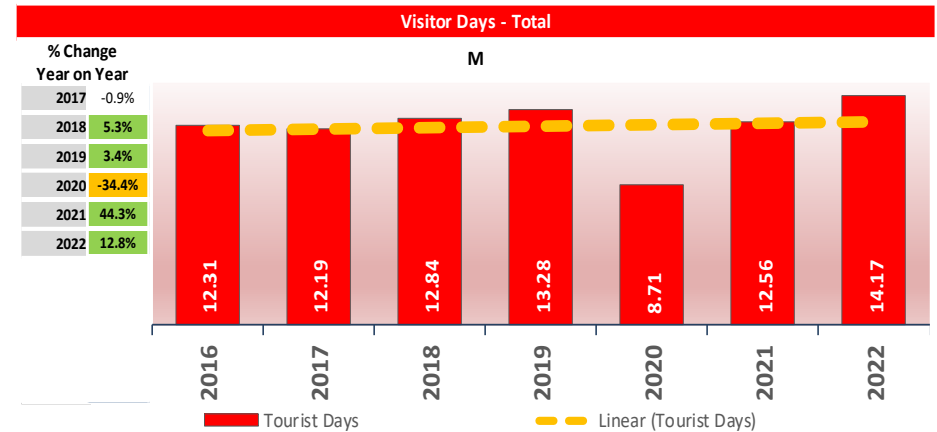
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	M	0.887	0.925	0.034	1.846	6.893	8.739
2021 (Millions)	M	0.736	0.799	0.031	1.565	6.202	7.768
Change 21/22 (%)	%	+20.5	+15.8	+10.1	+17.9	+11.1	+12.5
Share of Total (%)	%	10.2	10.6	0.4	21.1	78.9	100.0

**Total
Visitor
Days**
14.2m

Visitor Days

Visitors spent an estimated 14.2m days in the North York Moors National Park during 2022. 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.

Total staying visitors accounted for 7.23m visitor days in 2022, an increase of 14.4% on 2021; they are now 10.3% above pre-covid 2019 figures. The serviced accommodation sector saw an increase of 18.7% when compared to 2021 and is now just -2.9% below pre-covid figures reported in 2019. In contrast, the non-serviced sector has recovered to 15.3% above pre-covid levels with an increase 13.3% compared to 2021, evidencing a steady recovery for both staying visitor sectors. While all staying visitor numbers have surpassed, or are close to, pre-covid levels, day visitor numbers have also recovered. They have increased year-on-year since 2019, and by 11.1% since 2021; they are now 3.2% above pre-covid day visitor numbers, contrasting with a general negative trend seen throughout the rest of the UK to varying degrees.



Key Figures: Visitor Days 2022

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	M	1.693	5.437	0.147	7.277	6.893	14.170
2021 (Millions)	M	1.427	4.799	0.137	6.362	6.202	12.564
Change 21/22 (%)	%	+18.7	+13.3	+7.5	+14.4	+11.1	+12.8
Share of Total (%)	%	11.9	38.4	1.0	51.4	48.6	100.0

Average Length of Stay for Different Visitor Types: 2022

Day
Visitors
1.0

All
Visitors
1.6

Serviced
Accommodation
1.9

Staying with
Friends/Relatives
4.4

All Staying
Visitors
3.9

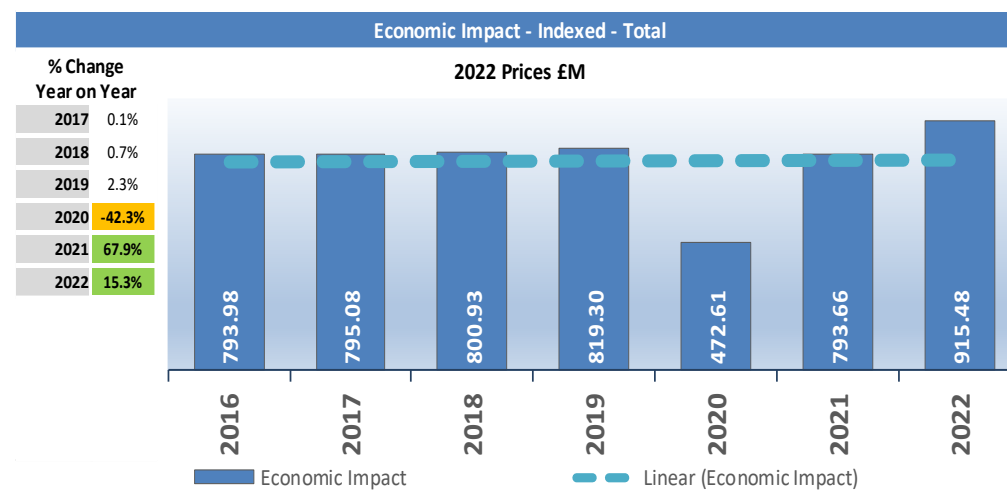
Non-Serviced
Accommodation
5.9

**Total
Economic
Impact
£915.5m**

Economic Impact

The value of tourism activity in the North York Moors National Park was estimated to be £915.5m in 2022 (a substantial increase of 15.3% on the previous year). In comparison, the Park's visitor economy was worth £819.3m in 2019, so the economic impact of tourism is now above pre-covid levels by 11.7% which is promising news.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £684.5m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £231m, together totalling £915.5m. The largest visitor spending sector was Shopping (£193m), followed by Accommodation (£185m), and Food & Drink (£161.5m). In 2022, the National Park's day visitor market accounted for 32.9% of the value of tourism activity at £301m, 3.3% above pre-covid economic activity, contrasting with usually negative trends throughout the rest of the UK. Meanwhile, the staying visitor market accounted for the remaining 67.1% of economic value at £614m and as such is above pre-covid levels by 16.4%, boosted in part by a strong recovery in the National Park's non-serviced sector which is now 28.8% above pre-covid levels reported in 2019.



- 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

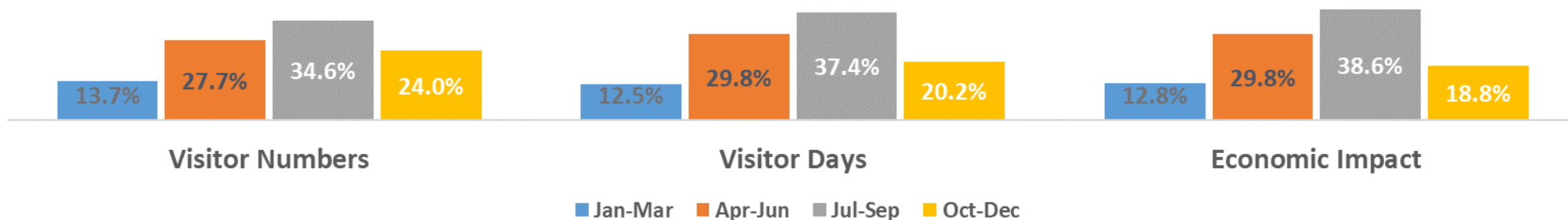
Key Figures: Economic Impact 2022 (Indexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (£ Millions)	£M	200.876	405.053	8.503	614.432	301.043	915.475
2021 (£ Millions)	£M	167.608	347.259	7.913	522.780	270.882	793.663
Change 21/22 (%)	%	+19.8	+16.6	+7.5	+17.5	+11.1	+15.3
Share of Total (%)	%	21.9	44.2	0.9	67.1	32.9	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	£118.68	£74.50	£57.66	£84.43	£43.68	£64.61
Economic Impact per Visit	£226.41	£437.89	£250.97	£332.83	£43.68	£104.76

Seasonal Distribution of Key Visitor Metrics: 2022



**Total
FTEs
Supported
11,076**

Employment Supported by Tourism

The expenditure and activity of visitors to the North York Moors National Park supported a total of 11,076 Full-Time Equivalent jobs (FTEs) in 2022; an increase of 1.4% on the year before, and just fractionally -1.9% below 2019 pre-covid levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 9,027 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 2,049 FTEs. The accommodation sector is the largest employment sector supported by tourism activity, accounting for an estimated 3,889 FTEs, followed by Shopping at 2,009 FTEs and Food & Drink at 1,848 FTEs.

Employment Supported by Tourism: Full-Time Equivalent (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	3,889	1,848	848	2,009	432	9,027	2,049	11,076

STEAM Comparative Headlines: 2021 and 2022

STEAM REPORT FOR 2016-2022 - FINAL

Comparing 2022 and 2021

COMPARATIVE HEADLINES

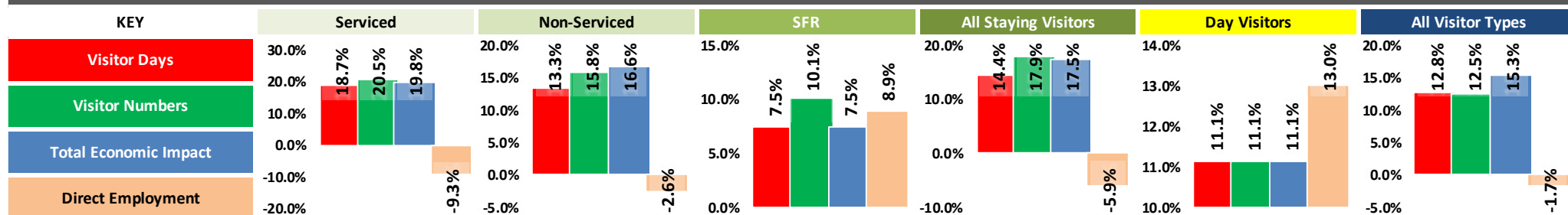
NORTH YORK MOORS NATIONAL PARK

2021 in 2022 prices (1.078)

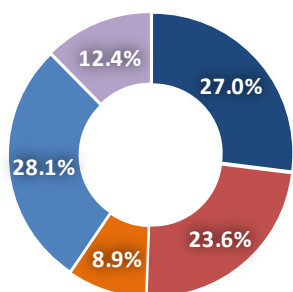
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2021 - INDEXED TO 2022

KEY	COMPARATIVE HEADLINES																				
	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	1.693	1.427	18.7%	5.437	4.799	13.3%	0.147	0.137	7.5%	7.277	6.362	14.4%	6.893	6.202	11.1%	14.17	12.56	12.8%			
Visitor Numbers M	0.887	0.736	20.5%	0.925	0.799	15.8%	0.034	0.031	10.1%	1.846	1.565	17.9%	6.893	6.202	11.1%	8.739	7.768	12.5%			
Direct Expenditure £M																684.47	594.16	15.2%			
Economic Impact £M	200.88	167.61	19.8%	405.05	347.26	16.6%	8.503	7.913	7.5%	614.43	522.78	17.5%	301.04	270.88	11.1%	915.48	793.66	15.3%			
Direct Employment FTEs	3,303	3,642	-9.3%	3,361	3,451	-2.6%	66	60	8.9%	6,729	7,154	-5.9%	2,297	2,033	13.0%	9,027	9,187	-1.7%			
Total Employment FTEs																11,076	10,927	1.4%			

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



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



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

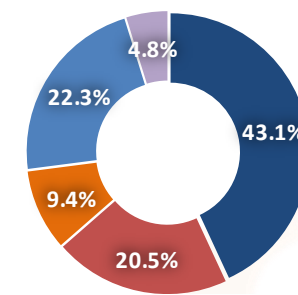
Direct Expenditure Categories

	2022	2021	+/- %
Accommodation	184.72	149.98	23.2%
Food & Drink	161.47	143.43	12.6%
Recreation	61.08	54.86	11.3%
Shopping	192.61	170.11	13.2%
Transport	84.58	75.78	11.6%
TOTAL DIRECT	684.47	594.16	15.2%
Indirect	231.01	199.51	15.8%
TOTAL	915.48	793.66	15.3%

Sectors

Sectors	2022	2021	+/- %
Accommodation	3,889	4,699	-17.2%
Food & Drink	1,848	1,613	14.5%
Recreation	848	749	13.3%
Shopping	2,009	1,744	15.2%
Transport	432	381	13.5%
TOTAL DIRECT	9,027	9,187	-1.7%
Indirect	2,049	1,740	17.8%
TOTAL	11,076	10,927	1.4%

Sectoral Distribution of Employment - FTEs



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

Direct Employment Categories

STEAM Comparative Headlines: 2019 and 2022 Covid Recovery

STEAM REPORT FOR 2016-2022 - FINAL
NORTH YORK MOORS NATIONAL PARK

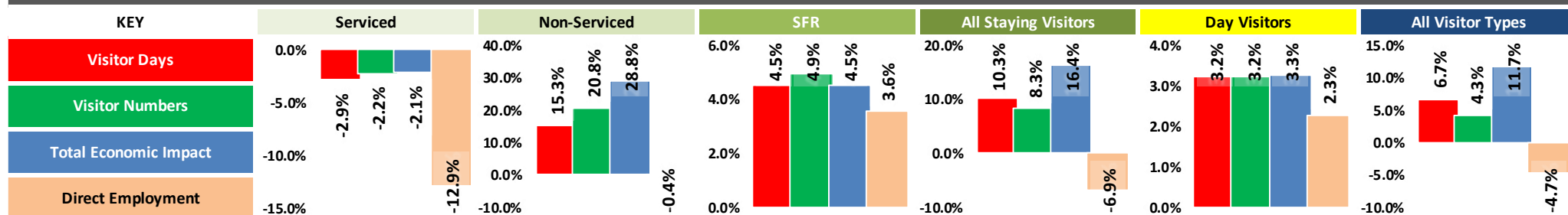
Comparing 2022 and 2019
2019 in 2022 prices (1.123)

COMPARATIVE HEADLINES

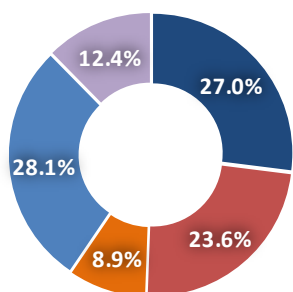
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2019 - INDEXED TO 2022

KEY	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	1.693	1.742	-2.9%	5.437	4.716	15.3%	0.147	0.141	4.5%	7.277	6.600	10.3%	6.893	6.676	3.2%	14.17	13.28	6.7%		
Visitor Numbers	M	0.887	0.907	-2.2%	0.925	0.766	20.8%	0.034	0.032	4.9%	1.846	1.705	8.3%	6.893	6.676	3.2%	8.739	8.382	4.3%		
Direct Expenditure	£M																684.47	616.51	11.0%		
Economic Impact	£M	200.88	205.24	-2.1%	405.05	314.39	28.8%	8.503	8.134	4.5%	614.43	527.77	16.4%	301.04	291.54	3.3%	915.48	819.30	11.7%		
Direct Employment	FTEs	3,303	3,791	-12.9%	3,361	3,374	-0.4%	66	64	3.6%	6,729	7,228	-6.9%	2,297	2,246	2.3%	9,027	9,474	-4.7%		
Total Employment	FTEs																11,076	11,290	-1.9%		

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2019 - INDEXED TO 2022



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



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

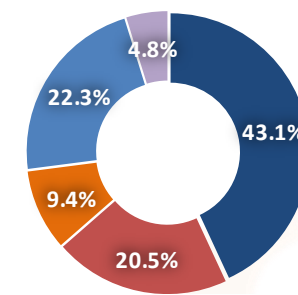
Direct Expenditure Categories

	2022	2019	+/- %
Accommodation	184.72	144.05	28.2%
Food & Drink	161.47	152.01	6.2%
Recreation	61.08	57.84	5.6%
Shopping	192.61	182.04	5.8%
Transport	84.58	80.57	5.0%
TOTAL DIRECT	684.47	616.51	11.0%
Indirect	231.01	202.79	13.9%
TOTAL	915.48	819.30	11.7%

Sectors

Sectors	2022	2019	+/- %
Accommodation	3,889	4,574	-15.0%
Food & Drink	1,848	1,756	5.2%
Recreation	848	811	4.6%
Shopping	2,009	1,917	4.8%
Transport	432	416	4.0%
TOTAL DIRECT	9,027	9,474	-4.7%
Indirect	2,049	1,816	12.8%
TOTAL	11,076	11,290	-1.9%

Sectoral Distribution of Employment - FTEs



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

Direct Employment Categories

The North York Moors National Park Boundary

