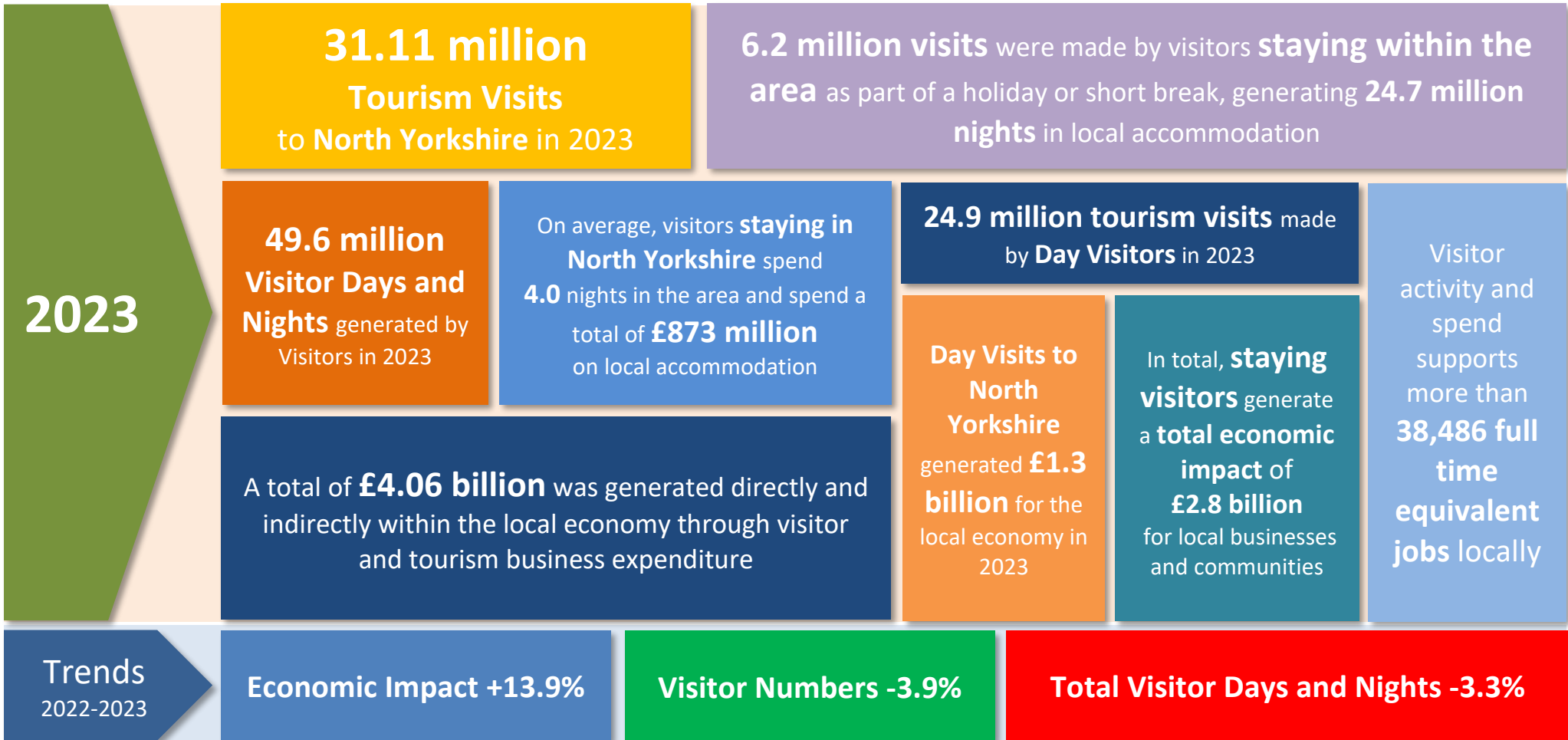


The Visitor Economy of North Yorkshire

This is a summary of the annual tourism economic impact research undertaken for North Yorkshire Council for the calendar year 2023. Outputs in this report have been generated using STEAM, the tourism specific local economic impact model, owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19 Pandemic Some STEAM outputs for 2023 still remain below the estimated level of usual economic outputs for the area, due to the residual effects of the COVID-19 pandemic on business and consumer activity, combined with the current economic climate.



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

20% of Visits

Day Visitors

80% of Visits

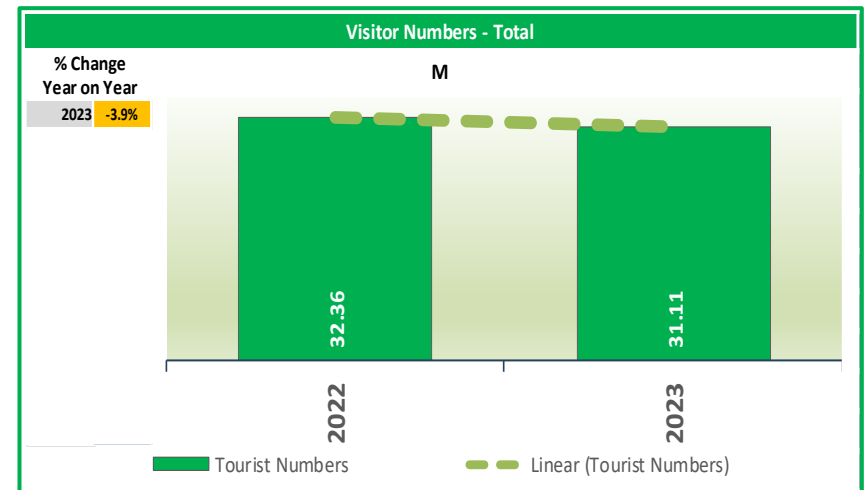
Total Visitor Numbers
31.1m

Visitor Numbers

There were an estimated 31.1m tourism visits to North Yorkshire in 2023. This was slightly down from an estimated 32.4m tourism visits in 2022, but visitor numbers throughout the UK were high in 2022 as a result of a ‘bounce back’ in visitors after the covid pandemic.

In 2023, 6.2m visitors stayed in some sort of accommodation within the area. The staying visitor sector, as a whole saw a marginal decrease of -1.2%, from 6.29m to 6.21m, when compared to 2022. But over the same period, serviced accommodation numbers rose by 1%, from 2.63m to 2.66m, indicating a slight rise in visitors staying in hotels, guest houses and B&Bs. In contrast,

the non-serviced accommodation sector saw a minor drop of -3%, from 2.89m down to 2.80m indicating a small decrease in visitors staying in self-catering accommodation, usually over a seven-day period. This might be due to an upturn in folk heading overseas for ‘sand & sun’ holidays in 2023. Day visitor numbers to North Yorkshire, which make up 80% of visitor numbers to the area, were slightly down by -4.5%, from 26.1m in 2022, to 24.9m in 2023. Day visitor numbers throughout most of the UK, have remained stubbornly below, or just breaking even with, estimated 2019 pre-covid levels.



Key Figures: Visitor Numbers 2023

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	M	2.657	2.805	0.752	6.214	24.898	31.111
2022 (Millions)	M	2.631	2.890	0.769	6.290	26.068	32.358
Change 22/23 (%)	%	+1.0	-3.0	-2.3	-1.2	-4.5	-3.9
Share of Total (%)	%	8.5	9.0	2.4	20.0	80.0	100.0

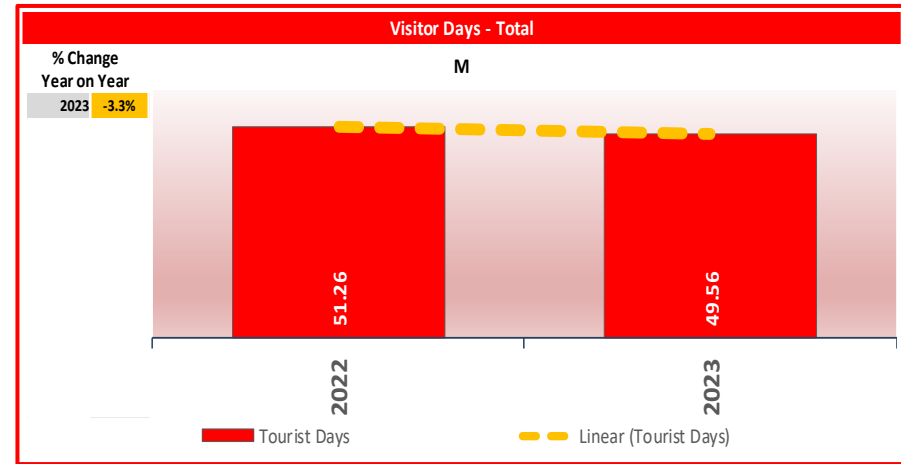
**Total
Visitor
Days**
49.6m

Visitor Days

Visitors spent an estimated 49.6m days in North Yorkshire 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 area stay 4.0 days, which is high compared to other areas.

Total all staying visitors to the area accounted for 24.7m visitor days in 2023, a slight decrease of -2.1% on 2022 when all staying visitor days were estimated at 25.2m. The serviced accommodation sector saw an increase of 1.0%,

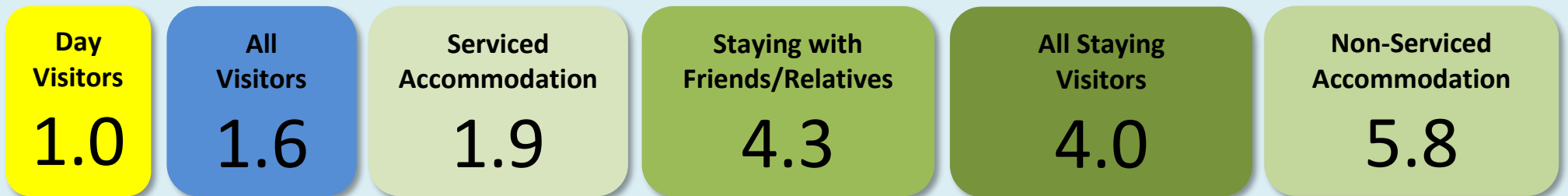
from 5.09 to 5.14 when compared to 2022, and showed an average stay of 1.9 days, pointing to a predominance of two-day stays. Meanwhile the non-serviced accommodation sector decreased marginally by -2.9%, from 16.7m to 16.3m when compared to 2022, but showed an average stay of 5.8 days, indicating a high percentage of weekly rentals in the area. Day visitors decreased by -4.5%, from 26.1m to 24.9m, matching a general slightly negative day visitor trend seen throughout the rest of the UK to varying degrees in 2023, especially in rural or semi-rural areas.



Key Figures: Visitor Days 2023

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	M	5.140	16.256	3.269	24.665	24.898	49.562
2022 (Millions)	M	5.090	16.750	3.353	25.194	26.068	51.261
Change 22/23 (%)	%	+1.0	-2.9	-2.5	-2.1	-4.5	-3.3
Share of Total (%)	%	10.4	32.8	6.6	49.8	50.2	100.0

Average Length of Stay for Different Visitor Types: 2023



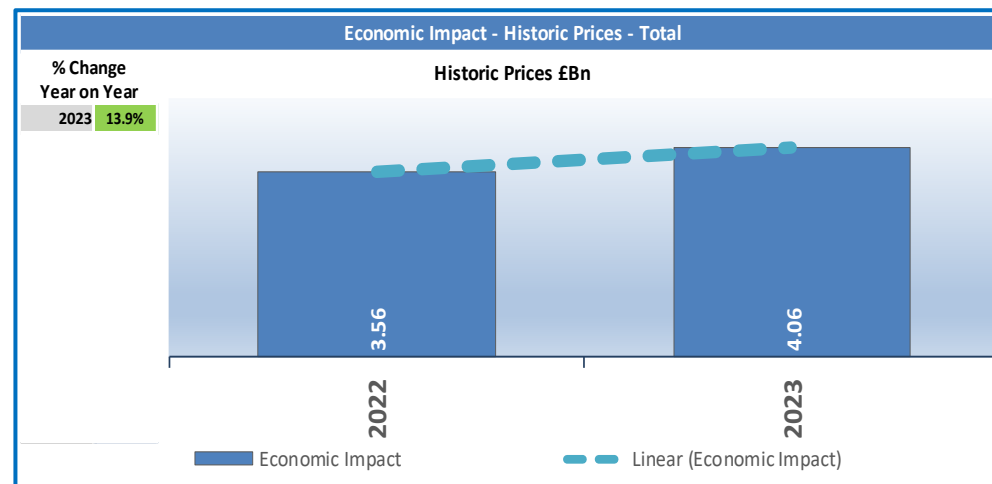
**Total
Economic
Impact
£4.06bn**

Economic Impact

The value of tourism activity in North Yorkshire was estimated to be £4.06bn in 2023, an increase of 13.9% on the previous year (see indexed figures on page 7), when the economic impact of visitors was estimated at £3.56bn.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £2.87bn. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were conservatively estimated to account for a further £1.19bn, together

totalling £4.06bn. The largest visitor spending sectors were Accommodation (£873m), then Shopping (£762m), followed by Food & Drink (£650m). In 2023, the area's large day visitor market accounted for 31.9% of the value of tourism activity at £1.3m, 8.2% above the estimated day visitor economic impact of £1.2bn in 2022. Meanwhile, the staying visitor market accounted for the remaining 68.1% of economic value at £2.8bn, up 16.9% from the previous year. Both the serviced accommodation sector and the non-serviced accommodation sector saw healthy increases in economic impact, driven by visitors staying in the area for an average of four nights.



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

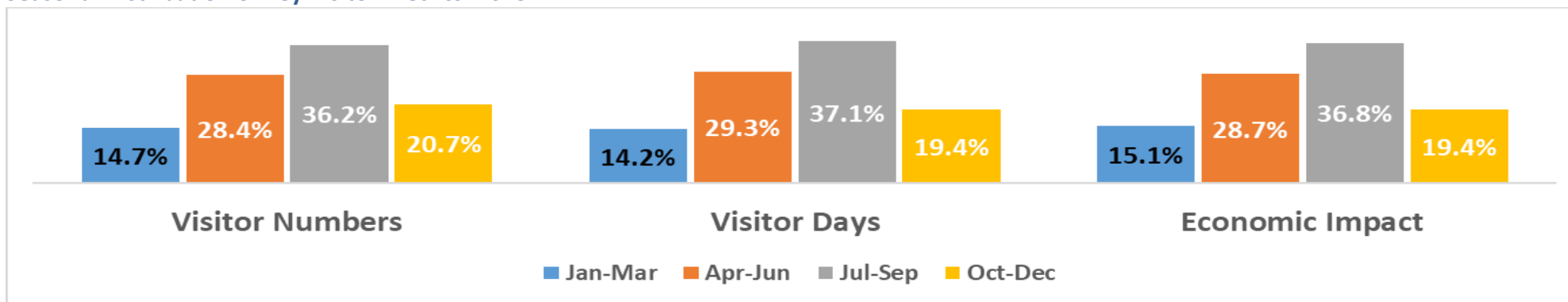
Key Figures: Economic Impact 2023

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (£ Billions)	£Bn	0.783	1.748	0.235	2.765	1.296	4.061
2022 (£ Billions)	£Bn	0.698	1.455	0.212	2.366	1.197	3.564
Change 22/23 (%)	%	+12.1	+20.1	+10.5	+16.9	+8.2	+13.9
Share of Total (%)	%	19.3	43.0	5.8	68.1	31.9	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	£ 152.29	£ 107.51	£ 71.82	£ 112.11	£ 52.03	£ 81.93
Economic Impact per Visit	£ 294.58	£ 623.07	£ 312.31	£ 445.00	£ 52.03	£ 130.52

Seasonal Distribution of Key Visitor Metrics: 2023



**Total
FTEs
Supported
38,486**

Employment Supported by Tourism

The expenditure and activity of visitors to North Yorkshire supported a total of 38,486 Full-Time Equivalent jobs (FTEs) in 2023; an increase of 4.0% on the year before, driven largely by activity in the non-serviced accommodation and day visitor sectors over the same period.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 28,543 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 9,943 FTEs. The accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 9,269 FTEs, followed by Shopping at 7,470 FTEs and then Food & Drink at 6,973 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	9,269	6,973	3,204	7,470	1,627	28,543	9,943	38,486

STEAM Comparative Headlines: 2022 and 2023 (unindexed)

STEAM REPORT FOR 2022-2023 - FINAL

Comparing 2023 and 2022

COMPARATIVE HEADLINES

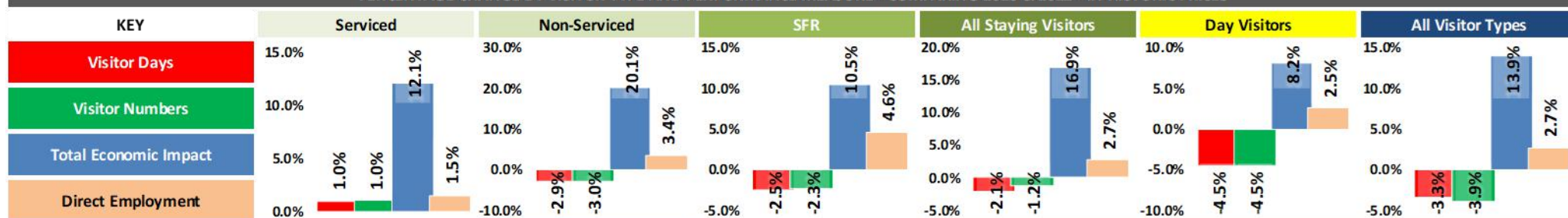
NORTH YORKSHIRE

All £'s Historic Prices

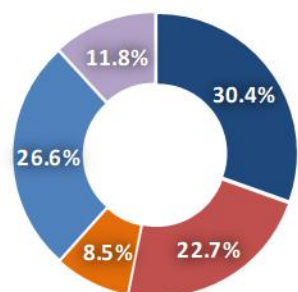
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2022 - IN HISTORIC PRICES

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	+/- %			
Visitor Days	M	5,140	5,090	1.0%	16.26	16.75	-2.9%	3.269	3.353	-2.5%	24.66	25.19	-2.1%	24.90	26.07	-4.5%	49.56	51.26	-3.3%		
Visitor Numbers	M	2,657	2,631	1.0%	2.805	2.890	-3.0%	0.752	0.769	-2.3%	6.214	6.290	-1.2%	24.90	26.07	-4.5%	31.11	32.36	-3.9%		
Direct Expenditure	£Bn																2.868	2.518	13.9%		
Economic Impact	£Bn	0.783	0.698	12.1%	1.748	1.455	20.1%	0.235	0.212	10.5%	2.765	2.366	16.9%	1.296	1.197	8.2%	4.061	3.564	13.9%		
Direct Employment	FTEs	8,272	8,148	1.5%	9,794	9,470	3.4%	1,629	1,556	4.6%	19,695	19,175	2.7%	8,848	8,629	2.5%	28,543	27,804	2.7%		
Total Employment	FTEs																38,486	37,016	4.0%		

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2023 & 2022 - IN HISTORIC PRICES



Sectoral Distribution of Economic Impact - £Bn including VAT in Historic Prices



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

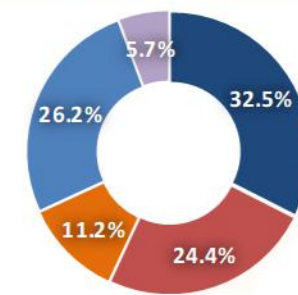
Direct Expenditure Categories

	2023	2022	+/- %
Accommodation	0.873	0.701	24.6%
Food & Drink	0.650	0.590	10.2%
Recreation	0.244	0.222	9.7%
Shopping	0.762	0.696	9.5%
Transport	0.339	0.308	9.7%
TOTAL DIRECT	2.868	2.518	13.9%
Indirect	1.192	1.045	14.1%
TOTAL	4.061	3.564	13.9%

Sectors

Sectors	2023	2022	+/- %
Accommodation	9,269	9,256	0.1%
Food & Drink	6,973	6,688	4.2%
Recreation	3,204	3,085	3.9%
Shopping	7,470	7,210	3.6%
Transport	1,627	1,566	3.9%
TOTAL DIRECT	28,543	27,804	2.7%
Indirect	9,943	9,212	7.9%
TOTAL	38,486	37,016	4.0%

Sectoral Distribution of Employment - FTEs



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

Direct Employment Categories

STEAM Comparative Headlines: 2022 and 2023 (indexed)

STEAM REPORT FOR 2022-2023 - FINAL

Comparing 2023 and 2022

COMPARATIVE HEADLINES

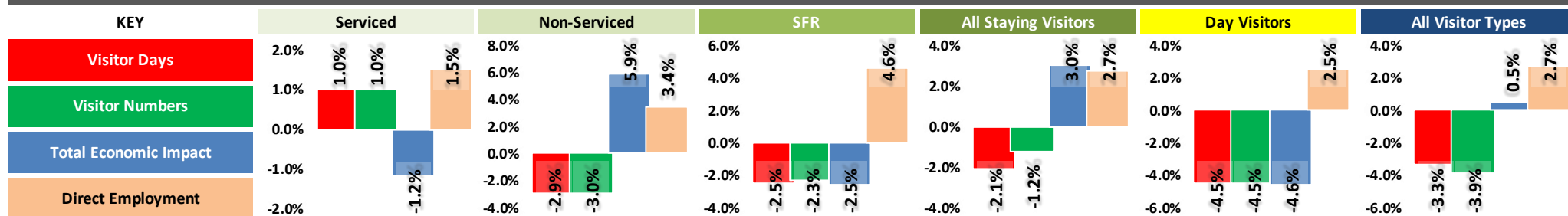
NORTH YORKSHIRE

2022 in 2023 prices (1.134)

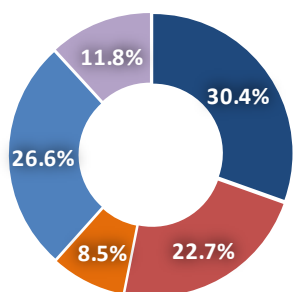
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2022 - INDEXED TO 2023

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	+/- %			
Visitor Days M	5.140	5.090	1.0%	16.26	16.75	-2.9%	3.269	3.353	-2.5%	24.66	25.19	-2.1%	24.90	26.07	-4.5%	49.56	51.26	-3.3%			
Visitor Numbers M	2.657	2.631	1.0%	2.805	2.890	-3.0%	0.752	0.769	-2.3%	6.214	6.290	-1.2%	24.90	26.07	-4.5%	31.11	32.36	-3.9%			
Direct Expenditure £Bn																2.868	2.856	0.4%			
Economic Impact £Bn	0.783	0.792	-1.2%	1.748	1.650	5.9%	0.235	0.241	-2.5%	2.765	2.683	3.0%	1.296	1.358	-4.6%	4.061	4.041	0.5%			
Direct Employment FTEs	8,272	8,148	1.5%	9,794	9,470	3.4%	1,629	1,556	4.6%	19,695	19,175	2.7%	8,848	8,629	2.5%	28,543	27,804	2.7%			
Total Employment FTEs																38,486	37,016	4.0%			

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



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

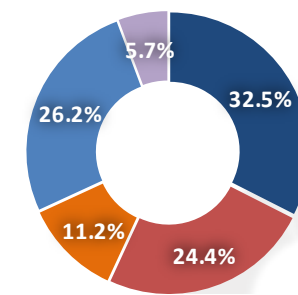
Direct Expenditure Categories

	2023	2022	+/- %
Accommodation	0.873	0.795	9.9%
Food & Drink	0.650	0.670	-2.9%
Recreation	0.244	0.252	-3.3%
Shopping	0.762	0.790	-3.5%
Transport	0.339	0.350	-3.2%
TOTAL	2.868	2.856	0.4%
Indirect	1.192	1.186	0.6%
TOTAL	4.061	4.041	0.5%

Sectors

	2023	2022	+/- %
Accommodation	9,269	9,256	0.1%
Food & Drink	6,973	6,688	4.2%
Recreation	3,204	3,085	3.9%
Shopping	7,470	7,210	3.6%
Transport	1,627	1,566	3.9%
TOTAL DIRECT	28,543	27,804	2.7%
Indirect	9,943	9,212	7.9%
TOTAL	38,486	37,016	4.0%

Sectoral Distribution of Employment - FTEs



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

Direct Employment Categories