Part of

North Yorkshire Council

STEAM Tourism Economic Impacts 2025 Year in Review Summary

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 years 2022-2025. 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 in most visitor sectors have now surpassed pre-Covid 19 estimates.**

2025

31.2 million tourism visits to **North Yorkshire** in **2025**

6.3 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **23.7 million nights** in local accommodation

48.7 million Visitor Days and Nights generated by Visitors in **2025**

On average, visitors **staying in the area** spend **3.8** nights in the area and spend a total of **£907 million** on local accommodation

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

Day Visits to North Yorkshire generated **£1.4 billion** for the local economy in **2025**

In total, **staying visitors** generate a **total economic impact** of **£2.9 billion** for local businesses and communities

Visitor activity and spend supports more than **36,527 full time equivalent jobs** locally

A total of **£4.3 billion** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Trends 2024-2025

Economic Impact +1.9%

Visitor Numbers -3.3%

Total Visitor Days and Nights -3.1%

2025

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

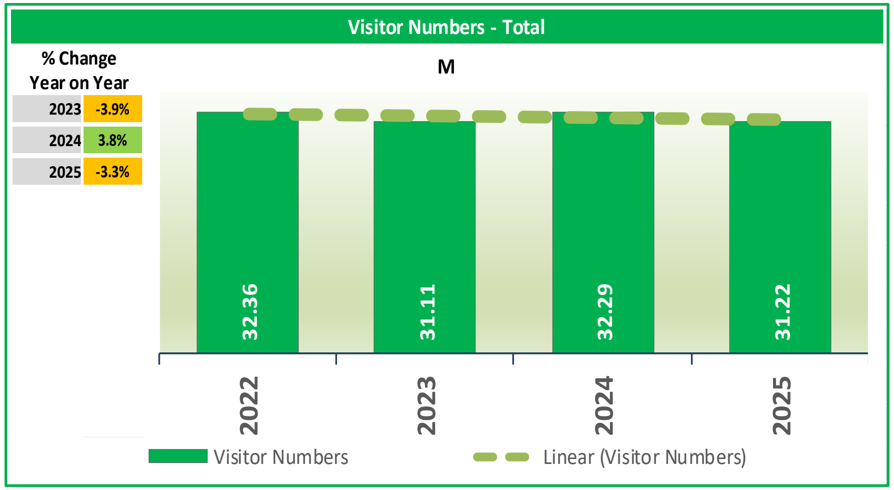
Day Visitors
80% of Visits

Total Visitor Numbers
31.2m

Visitor Numbers

There were an estimated 31.2m tourism visits to North Yorkshire in 2025, slightly down by -3.3% from the previous year, mainly due to decreases in day visitor numbers and to a lesser extent, visitors to serviced accommodation.

Between 2024 and 2025 visitor numbers dropped in North Yorkshire, but not uniformly. Visitor numbers were up in non-serviced accommodation (comprising self-catering options and some caravan, camping and touring sites) by 7.3%. But within the Day Visitor sector visitor numbers dipped by -4.7% and within the serviced accommodation sector (primarily comprised of hotels, guest houses and B&Bs) by -1.5% on the year before. The latter is a consistent pattern seen throughout the United Kingdom, with negative percents in serviced accommodation being commonplace, and one we attribute to the current economic climate. The serviced sector is usually the largest accommodation sector, but not in North Yorkshire, where the non-serviced sector has more visitors and also had a positive result in 2025. Meanwhile, day visitor numbers represent 80% of all visitors to the area, which is high when compared to other areas within the UK.



Key Figures: Visitor Numbers 2025

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**2.599**	**2.903**	**0.755**	**6.256**	**24.964**	**31.221**
2024 (Millions)	M	2.639	2.706	0.746	6.091	26.204	32.295
Change 24/25 (%)	**%**	**-1.5**	**+7.3**	**+1.2**	**+2.7**	**-4.7**	**-3.3**
Share of Total (%)	%	8.3	9.3	2.4	20.0	80.0	100.0

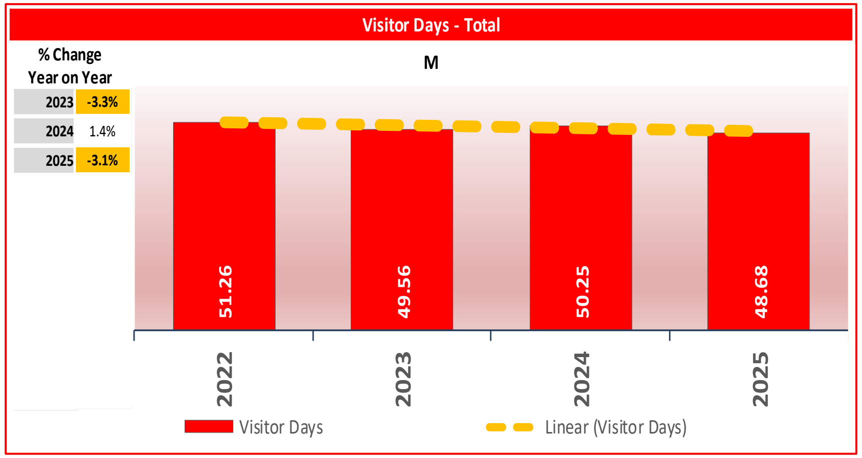
Total Visitor Days

48.7m

Visitor Days

Visitors spent an estimated 48.7m days in North Yorkshire during 2025. 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 3.8 days.

Total visitor days were down by -3.1% from the year before. This slight dip was evident throughout all sectors, with the exception of Staying with Friends and Relatives (SFR). The non-serviced accommodation sector saw a fractional decrease of -1.6%; combined with a rise in visitor numbers; this means while more visits were made to non-serviced accommodation, visitors stayed *slightly* less time. As mentioned before, we have seen a small downturn in serviced accommodation numbers throughout the UK, and estimates show a fractional decrease in the area of -2.4%. This means slightly fewer visitors stayed in serviced accommodation and visits were *marginally* shorter. Given the current economic uncertainties and constraints, this might be expected; it seems to be more apparent in urban locations. Day visitor numbers and days remain at -4.7% as day visitors do not stay overnight.



Key Figures: Visitor Days 2025

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**4.986**	**15.437**	**3.290**	**23.714**	**24.964**	**48.678**
2024 (Millions)	M	5.107	15.685	3.252	24.044	26.204	50.247
Change 24/25 (%)	**%**	**-2.4**	**-1.6**	**+1.2**	**-1.4**	**-4.7**	**-3.1**
Share of Total (%)	%	10.2	31.7	6.8	48.7	51.3	100.0

Average Length of Stay for Different Visitor Types: 2025

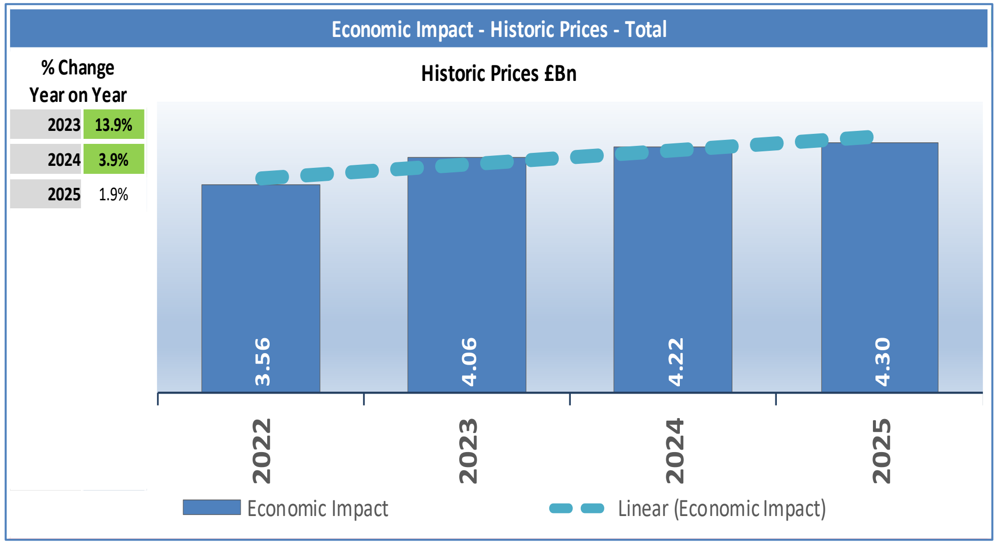
Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors	Non-Serviced Accommodation
1.0	1.6	1.9	4.4	3.8	5.3

Total Economic Impact

£4.3bn

Economic Impact

The value of tourism activity in North Yorkshire was estimated to be £4.3bn in 2025, up by 1.9% on the previous year, but fractionally down by -2.2% (indexed for inflation) when compared to 2022 estimates.



Economic impact is comprised of two sections within the model. The first is the direct expenditure on good and services, in this case, £3.04 million. To this we conservatively add the indirect economic impact within the area of £1.26 million, to account for the supply chain- those suppling goods and services to support the visitor sector and its wider infrastructure. The most important sector is the non-serviced accommodation visitor sector, at £1.8 million, up 4.2% on the previous year. This is followed by the day visitor sector at £1.4 million and then the serviced accommodation sector at £.82 million. The model also estimates the sectoral distribution of the economic impact as follows: Accommodation at £91m, then Shopping £82m; Food & Drink £69m; Transport £36m; and Recreation at £26m. The non-serviced accommodation sector has over twice the economic impact than the serviced sector, which is unusual (serviced is usually much larger). It also has a larger economic impact than the day visitor sector, again, this is atypical but illustrates the importance of the non-serviced accommodation sector within North Yorkshire.

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

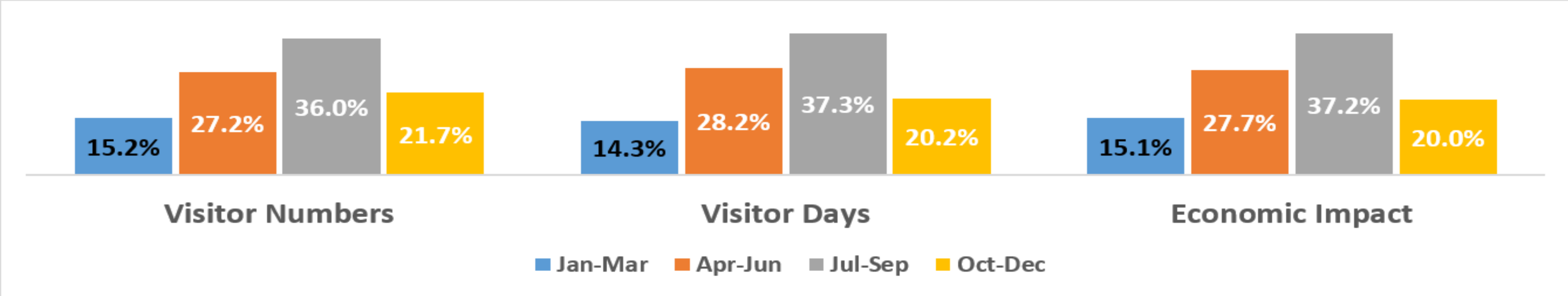
Key Figures: Economic Impact 2025 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (£ Billions)	**£Bn**	**0.821**	**1.809**	**0.257**	**2.888**	**1.411**	**4.299**
2024 (£ Billions)	£Bn	0.807	1.736	0.245	2.788	1.431	4.218
Change 24/25 (%)	**%**	**+1.8**	**+4.2**	**+4.9**	**+3.6**	**-1.4**	**+1.9**
Share of Total (%)	%	19.1	42.1	6.0	67.2	32.8	100.0

Average Economic Impact Generated by Each Type of Visitor: 2025

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£ 163.77**	**£ 116.29**	**£ 77.71**	**£ 120.92**	**£ 55.92**	**£ 87.58**
Economic Impact per Visit	£ 314.22	£ 618.43	£ 338.72	£ 458.32	£ 55.92	£ 136.56

Seasonal Distribution of Key Visitor Metrics: 2025



Total FTEs Supported

36,527

Employment Supported by Tourism

The expenditure and activity of visitors to North Yorkshire supported a total of 36,527 Full-Time Equivalent jobs (FTEs) in 2025; a slight decrease of -3.9% on the year before, and a fractional decrease of -1.3% on 2022 employment estimates.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 27,166 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 9,361 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 8,826 FTEs, followed by Shopping at 7,136 FTEs, then Food & Drink at 6,612 FTEs, followed by Recreation at 3,046 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2025

Employment Supported by Sector 2025	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	8,826	6,612	3,046	7,136	1,546	27,166	9,361	36,527

STEAM Comparative Headlines: 2024 and 2025 (Unindexed)

STEAM REPORT FOR 2022-2025 - FINAL

NORTH YORKSHIRE

Comparing 2025 and 2024

All £'s Historic Prices

COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2024 - IN HISTORIC PRICES

KEY

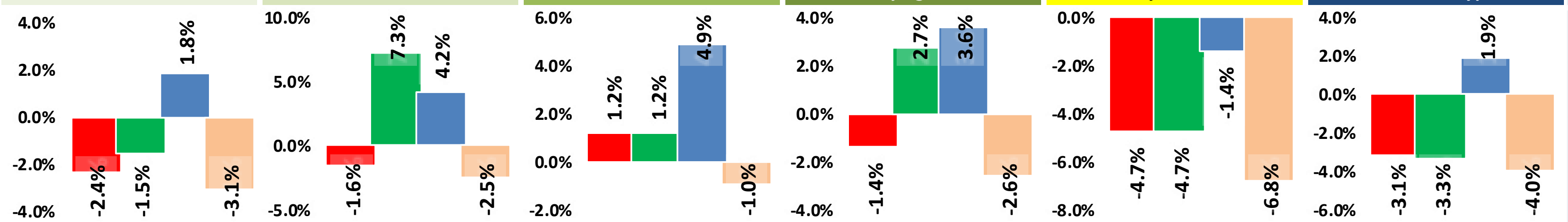
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %
Visitor Days	M	4.986	5.107	-2.4%	15.44	15.68	-1.6%	3.290	3.252	1.2%	23.71	24.04	-1.4%	24.96	26.20	-4.7%	48.68	50.25	-3.1%
Visitor Numbers	M	2.599	2.639	-1.5%	2.903	2.706	7.3%	0.755	0.746	1.2%	6.256	6.091	2.7%	24.96	26.20	-4.7%	31.22	32.29	-3.3%
Direct Expenditure	£Bn																3.039	2.981	1.9%
Economic Impact	£Bn	0.821	0.807	1.8%	1.809	1.736	4.2%	0.257	0.245	4.9%	2.888	2.788	3.6%	1.411	1.431	-1.4%	4.299	4.218	1.9%
Direct Employment	FTEs	7,749	7,996	-3.1%	9,235	9,468	-2.5%	1,589	1,604	-1.0%	18,573	19,068	-2.6%	8,593	9,217	-6.8%	27,166	28,285	-4.0%
Total Employment	FTEs																36,527	38,020	-3.9%

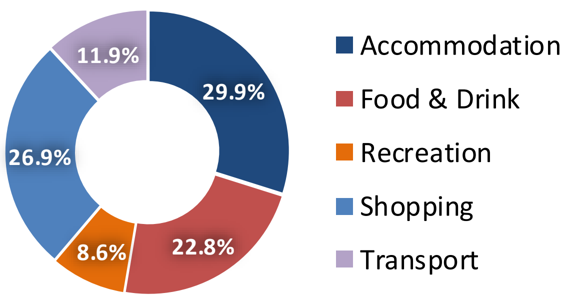
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2024 - IN HISTORIC PRICES

KEY

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



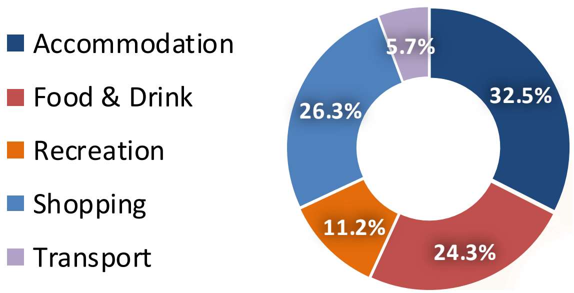
Sectoral Distribution of Economic Impact - £Bn including VAT in Historic Prices



Direct Expenditure Categories

Sectoral Distribution of Employment - FTEs

Sectors	Economic Impact 2025	Economic Impact 2024	+/- %	Employment 2025	Employment 2024	+/- %
Accommodation	0.907	0.862	5.3%	8,826	8,977	-1.7%
Food & Drink	0.692	0.688	0.7%	6,612	6,955	-4.9%
Recreation	0.260	0.259	0.3%	3,046	3,214	-5.2%
Shopping	0.818	0.812	0.6%	7,136	7,509	-5.0%
Transport	0.361	0.359	0.5%	1,546	1,629	-5.1%
TOTAL DIRECT	**3.039**	**2.981**	**1.9%**	**27,166**	**28,285**	**-4.0%**
Indirect	1.261	1.238	1.8%	9,361	9,735	-3.8%
TOTAL	**4.299**	**4.218**	**1.9%**	**36,527**	**38,020**	**-3.9%**



Direct Employment Categories

STEAM Comparative Headlines: 2022 and 2025 (Indexed for inflation)

STEAM REPORT FOR 2022-2025 - FINAL	Comparing 2025 and 2022	COMPARATIVE HEADLINES
NORTH YORKSHIRE	2022 in 2025 prices (1.233)	

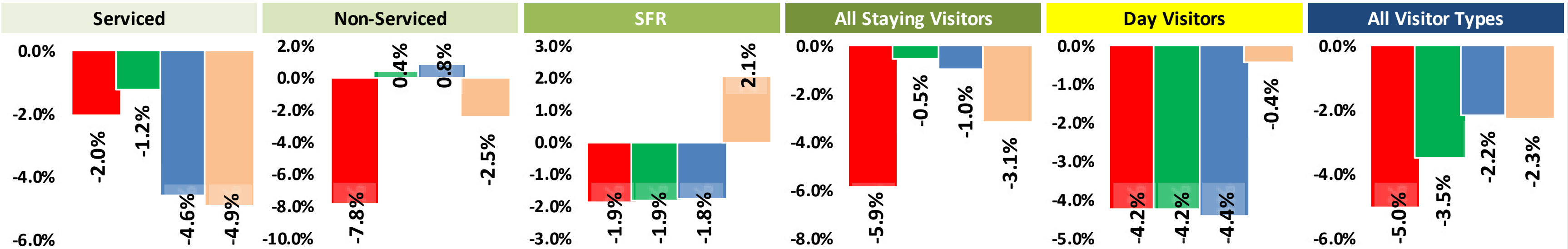
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2022 - INDEXED TO 2025

KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

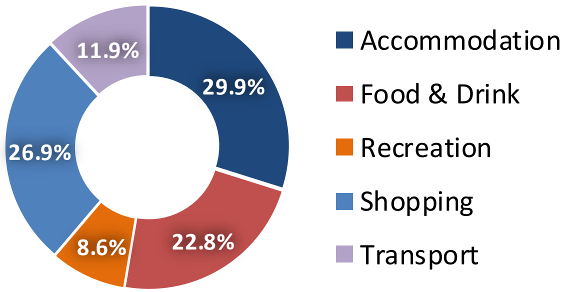
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2025	2022	+/- %	2025	2022	+/- %	2025	2022	+/- %	2025	2022	+/- %	2025	2022	+/- %	2025	2022	+/- %
Visitor Days	M	4.986	5.090	-2.0%	15.44	16.75	-7.8%	3.290	3.353	-1.9%	23.71	25.19	-5.9%	24.96	26.07	-4.2%	48.68	51.26	-5.0%
Visitor Numbers	M	2.599	2.631	-1.2%	2.903	2.890	0.4%	0.755	0.769	-1.9%	6.256	6.290	-0.5%	24.96	26.07	-4.2%	31.22	32.36	-3.5%
Direct Expenditure	£Bn																3.039	3.105	-2.1%
Economic Impact	£Bn	0.821	0.861	-4.6%	1.809	1.794	0.8%	0.257	0.262	-1.8%	2.888	2.917	-1.0%	1.411	1.476	-4.4%	4.299	4.394	-2.2%
Direct Employment	FTEs	7,749	8,148	-4.9%	9,235	9,470	-2.5%	1,589	1,556	2.1%	18,573	19,175	-3.1%	8,593	8,629	-0.4%	27,166	27,804	-2.3%
Total Employment	FTEs																36,527	37,016	-1.3%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2022 - INDEXED TO 2025

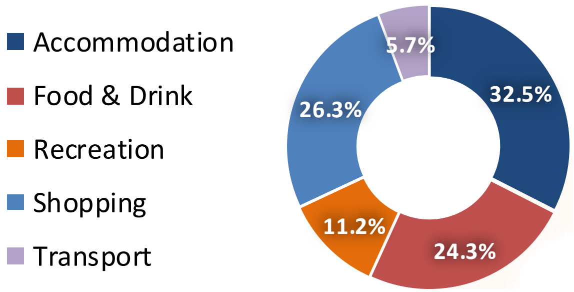
KEY
- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment



Sectoral Distribution of Economic Impact - £Bn including VAT Indexed to 2025			Sectors	Sectoral Distribution of Employment - FTEs		
2025	2022	+/- %		2025	2022	+/- %
0.907	0.864	5.0%	Accommodation	8,826	9,256	-4.6%
0.692	0.728	-4.9%	Food & Drink	6,612	6,688	-1.1%
0.260	0.274	-5.0%	Recreation	3,046	3,085	-1.3%
0.818	0.859	-4.8%	Shopping	7,136	7,210	-1.0%
0.361	0.380	-5.0%	Transport	1,546	1,566	-1.3%
3.039	3.105	-2.1%	TOTAL DIRECT	27,166	27,804	-2.3%
1.261	1.289	-2.2%	Indirect	9,361	9,212	1.6%
4.299	4.394	-2.2%	TOTAL	36,527	37,016	-1.3%



Direct Expenditure Categories



Direct Employment Categories