

North York Moors National Park Authority

20 March 2017

Tourism Update

1. Purpose of the Report

- 1.1 To update Members on the development of tourism in the North York Moors and the Authority's work to promote and support this.
- 1.2 To propose future work relating to tourism.
- 1.3 To seek approval for the recruitment of a Tourism Officer
- 1.4 To outline to Members the current position of the Yorkshire Coast Dbid

2. Background - Strategic Framework and Direction

- 2.1 In 2012 the Authority's Management Plan highlighted the importance of tourism both to the area and its communities, and to the Authority in seeking to deliver its second purpose. It identified that in recent years the sector had been in decline and set out policies and an aspiration for a 3% year-on-year real term growth in the value of the visitor economy.
 - 2.1.1 The Authority's Business Plan (2012 – 15) identified "promotion of the North York Moors to achieve the second purpose and support the local economy" as one of just two strategic priorities. It set out a number of delivery actions aimed at achieving this, including the development and implementation of a Promoting the Park Plan.
 - 2.1.2 Discussion with Members in both seminars and Committees in 2012, resulted in an agreed approach to the Authority's work in tourism, in particular that:
 - We would be led by, and build closer relationships with, tourism businesses.
 - We would work determinedly to assert the North York Moors brand (recognised as an "attract brand" by VisitEngland)
 - Our work would embrace the "wider North York Moors area", recognising that the North York Moors tourism economy included the towns and attractions around as well as within the National Park boundary
 - We would recognise, work in partnership and support the Yorkshire Coast brand
 - We would act in partnership and support the work of Welcome to Yorkshire
 - 2.1.3 In 2013, the Promoting the Park Plan (April 2013 - March 2016) was agreed, including detailed actions for both tourism and promotion. A progress update on achievements and delivery of key actions in the Plan was last presented to National Park Authority in September 2015. Set out in section 3 of this report is an assessment of recent progress.
 - 2.1.4 The Authority's new Business Plan (2017 – 2020) recognises that "Through allocating additional resources, working determinedly and closely with tourism businesses and partner agencies much has been achieved." It also states that "One Strategic Priority over the business plan period will continue to be: Increase the profile of the North York Moors to achieve the Second Purpose and support the local economy."

- 2.1.5 The Business Plan also includes actions to continue working with North York Moors Tourism businesses to enable and support them to promote their businesses through highlighting the special qualities of the National Park (including through strengthening/formalising the role of North York Moors Tourism Network as a Destination Partnership).
- 2.1.6 This strategic framework has guided our work on tourism over recent years. Set out below is a brief summary of some of the key achievements since the last update to Authority in 2015.

3. **Key Achievements 2015-17**

- 3.1 Progress made since the last Authority update in September 2015 includes the following:
- 3.2 **Working better with tourism businesses - North York Moors Tourism Network.** The network which is the central point of our working relationship with local tourism businesses has continued to grow both in size and in effectiveness. It now has well over 500 Members representing all sectors of the tourism industry. It is managed (voluntarily) by Susan Briggs of The Tourism Network, Ltd.
- 3.2.1 The network is an excellent means of communicating with businesses and developing and spreading good practice and to guide us in providing tailored support to the industry. As stated above, a key aim for the coming years is to further strengthen the role of the network as a destination partnership.
- 3.2.2 As planned, businesses were consulted upon what sort of Destination Partnership they would like to see develop in the future. All network member businesses were consulted and a clear majority of respondees expressed a desire for the partnership to be non-bureaucratic and business led without imposition of Membership fees working to a simple, agreed destination plan.
- 3.2.3 Subsequent discussions with the Local Enterprise Partnership ensured that this business need was reflected in the growth programme and this was subsequently supported by a funding round via the EARDF programme. A bid to this programme was submitted by this Authority in partnership with the Yorkshire Dales National Park and Howardian Hills and Nidderdale AONBs. The bid was successful and work is now underway.
- 3.3 **Coastal Communities Fund.** Funding of £455,000 was secured for the 'Sea Life, See Life' project and delivery, working alongside tourism businesses, was completed successfully in December 2016. Key project achievements include:
- Public realm enhancements at Robin Hood's Bay and Staithes
 - Improved interpretation and visitor information for coastal villages
 - A major new art installation of 50 mosaic panels installed along the 125m sea wall at Robin Hood's Bay
 - Refurbishment of the Robin Hoods Bay Parish Council run public toilets
 - Successful new events including the first Dark Skies Festival and our first pop-up Artisan Fair at The Moors National Park Centre
 - Marketing and financial support to existing events and festivals including Staithes Festival and Saltburn Food Festival.
 - Creation of a library of resources for businesses including: a marketing guide for businesses, an Insider's guide, perfect days to various locations on the coast, guide to fishing, outdoor activity providers, hygiene material
 - Film and photography commissions, raising the profile of the area and providing resources for business to promote the area

- New marketing literature including:
 - A closer look at the magical North York Moors coastline (aspirational booklet)
 - Old Jack's Boat Sticker Trail
 - Stargazing leaflet
 - Wildlife calendar
 - Senses wheel
- New and improved website area focused on visiting the Coast
- 'A Portrait of Staithes' oral history project creating a film to be shown at the 2017 Staithes Arts & Heritage Festival
- New interactive map for use on the Robin Hood's Bay Tourism Association website (to complement the grant-funded touchscreen kiosk purchase)
- Supported visits from journalists and bloggers
- A final conference event ('The Big Bash') for businesses to celebrate the project's achievements.

3.3.1 The independent evaluation for the project highlights how all the targets have been met or exceeded and concludes that the marketing resources provided have been well received and used by tourism businesses, while other parties, such as Robin Hood's Bay parish councillors are very upbeat that the project had helped facilitate things which they knew would not have happened without the CCF money.

3.3.2 Our stage one bid to the next round of Coastal Communities Funding has been approved and we are currently awaiting the outcome of the full bid, expected in "spring 2017". Success in this will enable continued work with coastal businesses and communities.

3.4 **Local Distinctiveness and Tourism Grant Fund.** Delivery of the grant continues and there is a stream of excellent projects being supported or in the pipeline. To date it has supported more than 40 projects, with successful applications from individual tourism businesses, organisations and business associations. As a result, businesses have been able to expand the tourism offer in the North York Moors with more collaborations and better promotion based on the area's special qualities

3.5 **Website and Social Media.** The visitor centred website continues to see growth, with unique users and page visits more than doubling since its launch in 2014, to reach 1.9 million unique visits and 2.5 million page visits in 2016. Our use of a range of social media channels, including Facebook, Twitter and Instagram continues to grow in reach and in impact

3.6 **Media Coverage.** Progress continues in raising the profile of the area, over recent years there has been a continuing trend of greatly increasing presence in national press, television and film. TV highlights include featuring in at least one episode of BBC1's Countryfile every year, with a weekly audience of more than 7.5 million, Channel 5's Yorkshire Vet, CBeebies Old Jack's Boat, BBC1's Secret Britain, Top Gear (with the Jeremy Clarkson-led team back in 2015 – this episode shown on BBC2 & simulcasted to worldwide territories, ultimately reached 350 million viewers). We also worked closely assisting the BBC Films and Heyday Films production, Testament of Youth, a film adaptation of the memoirs of Vera Brittain, featuring several locations across the National Park, and more recently, Dad's Army. Upcoming coverage includes Channel 5's four part series The Dales and Moors: A Year in the Wild.

- 3.7 **Providing New/Improved Attractions.** Over the last two years we have continued to maintain many visitor facilities (visitor centres, car parks, toilets, picnic areas, etc) to a very high standard, making the National Park a better place to visit. Improvements and extension of what is on offer particularly at Sutton Bank but also at The Moors National Park Centre has maintained the attractiveness of two of the National Park's key attractions.
- 3.8 **Working with Partner Agencies.** We have continued to have good relationships with key partners in the tourism area, including VisitBritain, Welcome to Yorkshire and local authorities. For example, effective joint working with Welcome to Yorkshire has enabled us to take advantage of the opportunity presented by the Tour of Yorkshire.
- 3.9 **In summary,** a huge amount has been achieved in delivering the aspirations in the Management Plan and the actions in both the Business Plan and the Promoting the Park Plan. All key actions have been successfully delivered with the exception of a major new road signing scheme, (for which provision has now separately been made in the York Potash Section 106). As a result, the Authority is better connected with local tourism businesses, is better engaged with partner agencies involved in tourism and has established a track record of effective delivery. Later in this report there is a summary of the current data which helps demonstrate the value and effectiveness of this work and which shows clearly positive growth trends in both the tourism economy and in the profile of the North York Moors.

4. Recent Trends in Tourism and Profile

- 4.1 Two significant pieces of research, STEAM (carried out annually) and the North York Moors Visitor Survey 2016 (carried out every five years), give us a good insight into the state of the tourism industry, trends in both the industry and in the North York Moors profile, together with behaviour and perceptions of visitors to the area.
- 4.2 Both reports show very positive results and suggest that the work done by businesses, by the Authority and by its partners has been highly effective. In all areas the Authority's stated aspirations have been exceeded.
- 4.3 A detailed summary of the Visitor Survey is attached at **Appendix 1**. The key headline results relating to our Management Plan targets are shown in table 1 below:

	2004 (Actual)	2011 (Actual)	2016 (Actual)	Target 2016	Target 2021
Visitor awareness of the NYMNP	n/a	34%	92%	37%	40%
Visitor awareness of Special Qualities	n/a	18%	51%	21%	24%
Visitor awareness of being in the NP	83%	73%	83%	83%	85%

- 4.4 Latest figures from the annual STEAM report¹ indicate that the value of tourism for the North York Moors and its influence area increased by 3.48% in the twelve months from 2014 to reach £608 million (index-linked for inflation) in 2015, with 7.6 million visitors (+4.43%), 11.7 million visitor days (+4.2%) and employing nearly 10,650 FTE (+1.6%).

¹ Global Tourism Solutions (UK) Ltd (2016) North York Moors National Park Scarborough Tourism Economic Activity Monitor (STEAM) report 2015 for the North York Moors National Park Authority

4.5 Moreover growth has been observed every year since 2012, when visitor numbers and value of the visitor economy were at their lowest since a decline was first identified in 2007. Between 2012 and 2015, cumulative growth of +8.9% has been seen in the value of tourism (index-linked), +13.1% in the volume of visitors, +10.3% in visitor days, and growth of +5.9% in FTE employment.

4.6 **In summary**, since the launch of the current Management Plan in 2012, the Authority has been pursuing a strategic priority to raise the profile of the North York Moors and support the tourism industry. Huge progress has been made in the last five years, by local businesses, by the Authority and by its partners, which is evidenced by both STEAM and the impressive results from the five-year Visitor Survey when compared with the previous survey in 2011.

5. **Proposed Future Action**

5.1 The business plan sets out the agreed actions for the coming four years. This includes continuing to nurture the North York Moors and North York Moors National Park brands and much ongoing work (including with partners) to ensure prominence of the brand and local offer in relevant campaigns and activities, and continue to build social media and media presence. In addition to ongoing core work, specific new actions for the coming year are:

- Commissioning additional PR support
- Improving signage
- Supporting the North York Moors Tourism network and developing its role as a business led destination partnership (EARDF funding has now been secured), including development of a Destination Plan
- Delivering Coastal Communities Fund round 4 (if successful)
- Delivering the tourism and local distinctiveness grant scheme

5.2 However, it was acknowledged by Members during approval of the Business Plan that targets, actions and resources would need to be revisited should implementation of the York Potash Section 106 agreement be required.

5.3 The Section 106 agreement requires significant new activity to mitigate the impacts of the development of the mine at Doves Nest Farm upon the tourism industry. To deliver the agreement and aim to avoid negative impact, the following actions now need to be taken by the Authority:

- Negotiate and agree a service level agreement each year with Welcome to Yorkshire, securing £200,000 activity to promote the North York Moors.
- Negotiate and agree a service level agreement each year with VisitBritain/VisitEngland, securing £100,000 activity to promote the North York Moors.
- Monitor delivery of SLAs and ensure compliance with requirements of S106.
- Deliver a £100,000 programme of activities to promote the North York Moors
- Deliver £50,000 pa scheme of support to local businesses (grant scheme)
- Commission (jointly with York Potash) an annual programme of research to identify and quantify the impact of the mine upon the tourism economy (estimated cost of research £100,000 pa). Should this research reveal greater than anticipated levels of negative impact, then the payment to the National Park Authority will be increased via an agreed formula
- Deliver a £400,000 scheme of signing of the North York Moors from major roads

5.4 This is a substantial body of work. Briony Fox, the new Director, starts work for the Authority in the very near future; she will be responsible for the Potash 106 budgets and will be followed by Rob Smith who will be concentrating on the enforcement and compliance issues. Whilst first steps have been taken since the go-ahead for the mine was announced three months ago, much more needs to be done to engage partners in delivery of the agreement, and there is still a major and complicated programme of work to be delivered by the Authority itself. If we are not to significantly alter and reduce our existing Business Plan aspirations, we will need additional staff resources to deliver parts of the programme and to support the Head of Promotion and Tourism, and the Director of Park Services in delivery. It is therefore recommended that we take immediate action to recruit a full time Tourism Officer for this purpose.

6. **Discover England Fund**

6.1 The Government's 8-Point Plan for National Parks highlights the importance of '*National Parks as world-class destinations*', '*offering more people the benefits of visiting a National Park without damaging their special qualities*' and '*sustainable tourism which is good for the rural economy and safeguards the environment*'.

6.2 To help implement the 8-point plan, the English National Park family is preparing a bid to the Discover England Fund to be submitted in mid-April 2017. The Fund aims to:

- develop world-class bookable English tourism products, targeted at the right international customers, at the right time and through the right channels
- join-up the product offering across large geographies or nationwide through a thematic approach for the benefit of the customer
- drive a collaborative and partnership approach to delivery across Destination Partnership and Local Enterprise Partnership boundaries for the longer term.

6.3 A series of two-year projects will be awarded funding of a minimum value of £1million. They must set out an ambitious and innovative approach that responds to a clearly identified and evidence-based market demand and customer-centric challenge.

6.4 The National Park family bid is being led by the Peak District National Park Authority which, if the bid is successful, will act as the accountable body for funds. It is expected that the majority of activity will be co-ordinated centrally by the Peak District NPA and VisitEngland/VisitBritain over a two-year period, with input from tourism officers in each of the National Parks, working closely with destination partnerships, in our case, the North York Moors Tourism Network. The governance structure for bid delivery is being finalised at present, but is likely to consist of a National Programme board and three regional boards to ensure the project meets local needs.

6.5 Given the scale of the bid (£1million across ten National Parks) and the need for this to cover central delivery costs and overseas activities, it is unlikely that significant funds will be passed to individual NPAs. However, it is expected that all National Parks would be included and would feature as the ten flagship destinations for England's countryside – and for the bid to be successful it is important that all ten English National Parks are involved.

6.6 The bid is also expected to contribute towards the global strength of the UK National Parks brand, which will support our work in this area.

6.7 The detailed business case for the national bid is currently being developed, but is likely to focus on:

- An online portal for bookable experiences in England's National Parks and their influence areas; integrating guided experiences with high quality accommodation, locally distinctive food & drink and transport.
- Identify and enhance existing guided experiences in the National Parks delivered by the private sector, ensuring it is easily bookable online by independents and through the international travel trade.
- Create new bookable guided experiences in each National Park led by National Park volunteers, maximising the value of the international Ranger brand and utilising the people who keep the National Parks special as authentic ambassadors for our places.
- Local ambassador training to improve the welcome for international visitors in our communities. Sense of place marketing toolkits which focus on international audiences and improve provision of multi-lingual resources for visitors.
- Awareness-raising activity in international markets. Working with VisitBritain and DMOs to engage with the travel trade and a global technology partner to create a virtual experience which generates wider global awareness.

7 Yorkshire Coast Dbid

7.1 On 21 March 2016, Members received a report detailing proposals being developed for a Destination Business Improvement District for the Yorkshire Coast. It was agreed that this Authority should support the proposal and provide up to £20,000 funding towards the cost of developing the Business Plan necessary to progress the project. This support was however subject to a number of concerns being satisfied, these were:

- Any Bid should recognise the need for resources to be spent improving the quality of the offer (hospitality, accommodation, infrastructure) as well as on marketing.
- Welcome to Yorkshire's funding and effectiveness should not be challenged.
- The aspiration for the Bid must reflect the very high quality of the North York Moors/York/Coastal area's natural and cultural assets.
- The Authority should have an appropriate role in the management and delivery of the Bid (reflecting its status as an eligible business etc).
- Any bid covering part of the wider North York Moors area should not actively disadvantage the rest of the area and the two dominant brands must integrate their offers effectively.
- The National Park brand should be used and it should be used in a fashion which reinforces its status.
- Any "coastal" bid should be based on a narrow strip within which businesses have a clear affinity with the coast and should certainly not be drawn simply along principal local authority boundaries. A wider area including a significant proportion of the National Park for example should be designed and implemented to represent both Yorkshire Coast and North York Moors brands.

7.2 On March 7 2017, all potential local authority partners to the DBid will meet to agree the way forward and confirm funding. At that meeting it is anticipated that a final position can be agreed on all of the above points. The outcome of the meeting together with a recommended course of action will be presented verbally to the meeting.

8. Financial and Staffing Implications

8.1 Budgets for all activities are contained in the Business Plan and external funding bids.

8.2 The cost of undertaking the activities to promote the North York Moors as required by the potash Section 106 agreement, including the cost of staff time, , will be covered by the financial provisions of that agreement. It is estimated that in the early years this would represent approximately 75% of the cost of an additional post.

9. Contribution to National Park Management Plan

9.1 The successful implementation of the proposals in this report will contribute to delivery of the following Management Plan policies:

B1 Visitor spend will be increased

B2 Opportunities for visiting the National Park outside traditional peak season will be promoted

B3 Overnight tourism in and around the National Park will be specifically promoted

B4 The quality and variety of tourism and recreation facilities and accommodation will be improved

U10 The awareness of the National Park amongst the regional population and visitors will be increased

U12 Opportunities to promote the wider North York Moors area and North York Moors National Park brands and sense of place will be created and taken

U14 Visitors' and the regional population's understanding of the special qualities will be increased

9.2 It would also contribute to achievement of the Authority's strategic priority to promote the North York Moors to achieve the second purpose and support the local economy.

9.3 It also contributes to this National Park's delivery of DEFRA's 8 point plan for National Parks.

10. Legal Implications

10.1 There are no legal implications arising from the recommendations contained in this report.

11. Recommendation

11.1 That Members note the report and confirm the direction of our tourism work.

11.2 That Members approve the recruitment of a Tourism Officer to undertake activities for the marketing and promotion of the North York Moors.

11.3 That Members agree an approach to be taken by the Authority relating to the development of a Destination Business Improvement District for the Yorkshire Coast.

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Background papers to this Report

File ref

1. Promoting the Park Plan 2013 – 2016
2. North York Moors Visitor Survey 2016
3. North York Moors National Park Authority Business Plan
4. Report to National Park Authority 21 March 2016 – Yorkshire Coast Destination Business Improvement District

Visitor Survey 2016

Background and Methodology

This is the third visitor survey to be commissioned by the National Park Authority; previous surveys were conducted in 2004 and 2011.

The findings from the research are used to measure progress towards the Authority's Management Plan targets, in relation to visitors' perceptions and awareness of the National Park and its special qualities, and also to understand who visits, in terms of their profile, visiting behaviour and visitor satisfaction/experience.

QA Research was commissioned to conduct the fieldwork and analysis on behalf of the Authority in July 2016. Seven interview locations were used: the same three locations as the 2011 survey (Osmotherley, Rosedale Abbey, Runswick Bay), plus four additional locations (Robin Hood's Bay, The Moors National Park Centre at Danby, Helmsley and Sutton Bank National Park Centre).

A total of 649 face-to-face interviews were undertaken in August and September 2016 during 'peak' summer holidays, with interview shifts conducted on a mixture of weekdays and weekends. This compares to 352 interviews for the 2011 survey.

The 2016 survey was broadly similar to the 2011 one to allow certain key comparisons to be made related to the Authority's performance indicators. Questions relating to visitor spend, establishing motivations to visit and how the experience could be improved, and gauging the level of influence that National Park status has on a visit were also added.

Where direct comparisons are possible, the 2016 results are displayed in two ways: restricted to the same three interview locations surveyed previously (Osmotherley, Rosedale Abbey, Runswick Bay), as well as against the seven interview locations as a whole.

Overall results are accurate to +/- 3.8% at 95% confidence (findings are based on a sample size inside the +/- 5% standard industry error rate required to provide statistically robust findings). Note the 2011 survey sample size was just outside the +/- 5% error rate required.

Key Findings

Visitor Profile

Table 1 reveals that the North York Moors is appealing mainly to families with young children and post-families, when compared to the population of England & Wales. The extended family and an ageing (and active) population are emerging trends.

Table 1. Visitor Group Profile by Age (%)

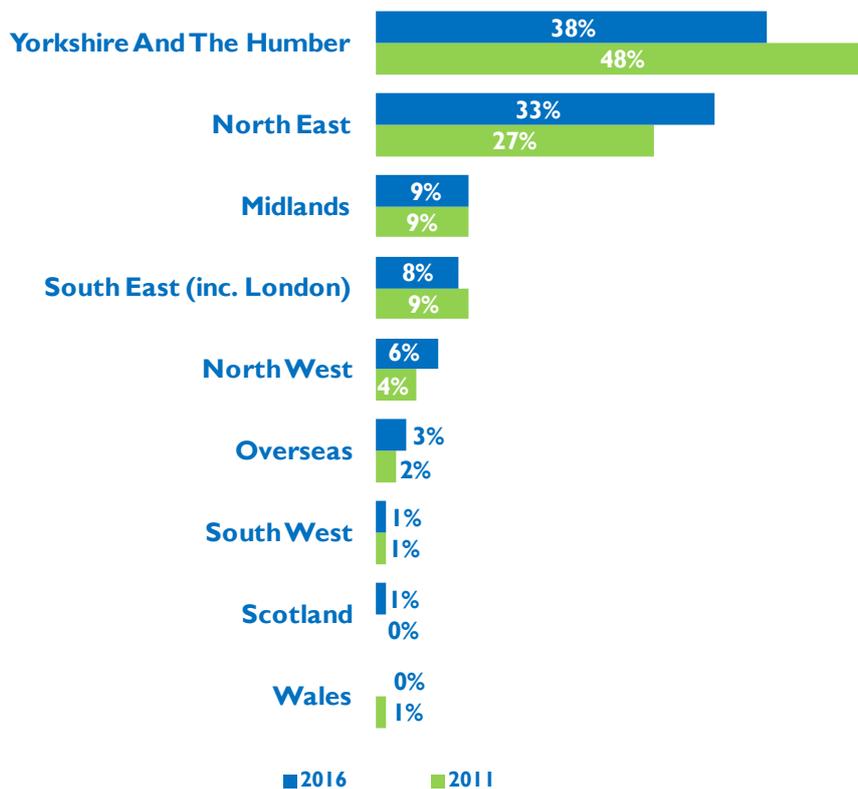
	Under 16	16-34	35-54	55-64	65+
North York Moors	28	14	29	17	13
England & Wales	19	25	28	12	16

The younger adults or millennials (16-34 category) accounts for just 14% of visitors in a party – compared to 25% for England & Wales. This reflects national trends which show that millennials are more likely to take their holidays in cities or large towns.

More than 40% of respondents visited with family, compared to 35% in 2011. A slightly higher proportion were accompanied by a spouse/partner than in 2011 (37% compared to 35% in 2014). In 2016, the average party size was 3.03 people, a slight fall from 3.36 in 2011.

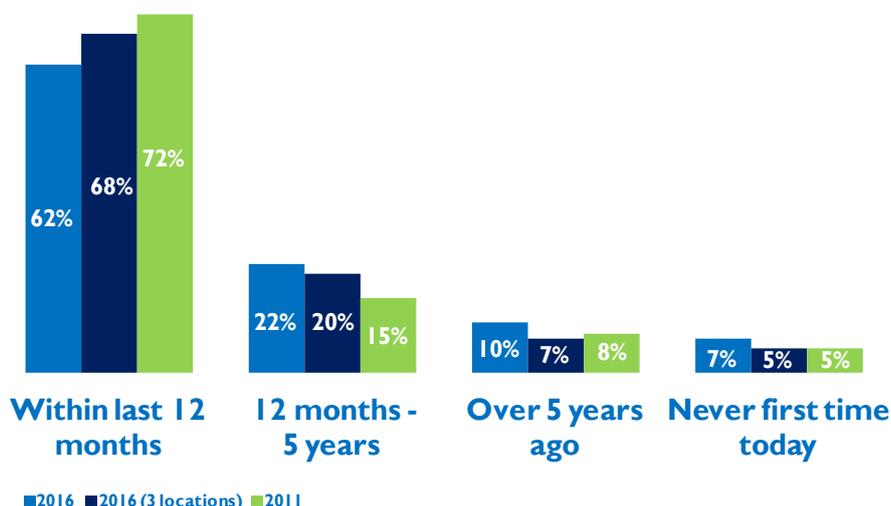
While the main audience for the National Park tends to be from Yorkshire and the Humber, this has declined significantly since 2011, while visitors from the North East and North West are increasing. Visitors from overseas have also grown, albeit from a small base (see Chart 1).

Chart 1. Origin of Visitors



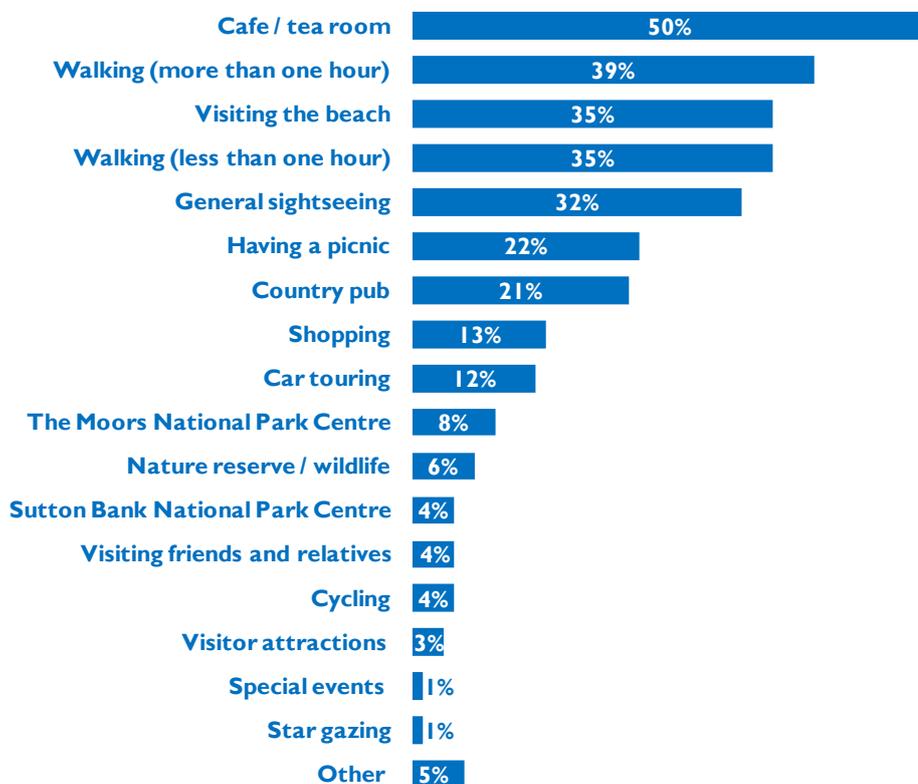
Over half of respondents were on a day trip from home (54%), compared to 48% in the 2011 survey. The National Park does attract a large cohort of regular, repeat visitors, a high proportion of which are on day trips. First time visitors have increased slightly (see Chart 2).

Chart 2. Previous Visits to the North York Moors



A broad variety of activities were cited by respondents, with visitors taking part in 2.97 activities on average in a day, indicating a wide-ranging visitor offer. In the main, visitors spend their time outdoors in the National Park, be it going for a walk (74%), visiting the beach (35%), having a picnic (22%), watching wildlife (6%), or cycling (4%) (see Chart 3).

Chart 3. Activities Participating or Participated in During a Visit



Eating out is very popular after all that fresh air, with half of those interviewed visiting a café or tea room and a further 21% frequenting a pub.

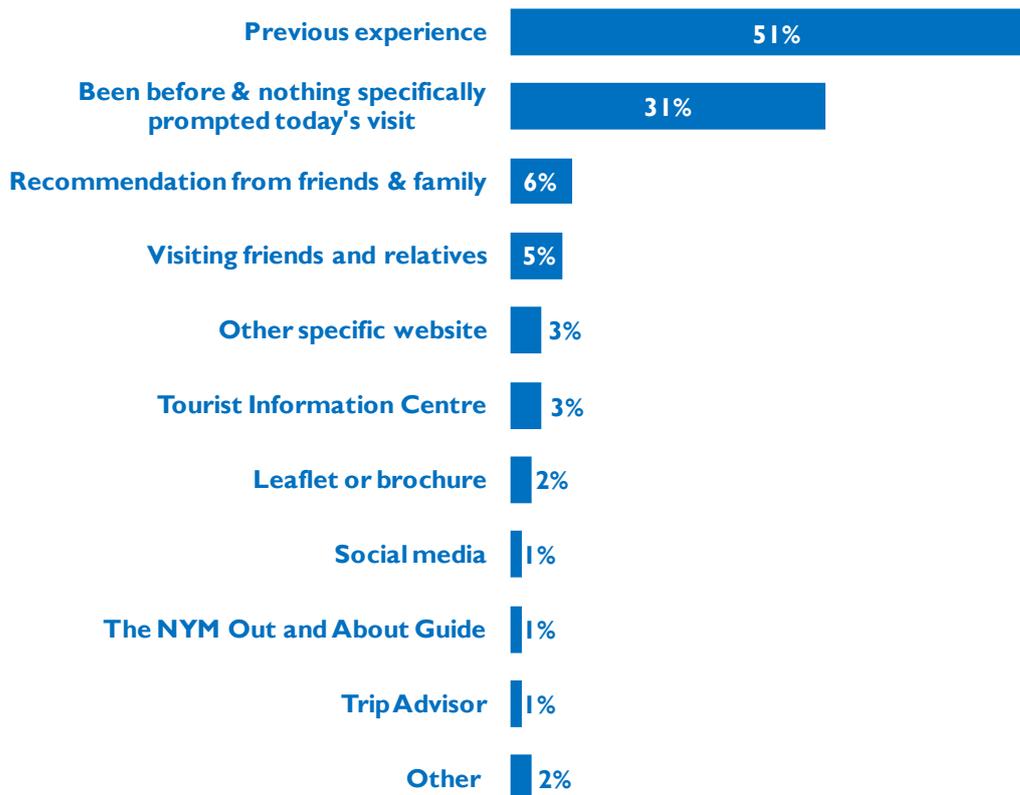
Stargazing has appeared for the first time, despite the survey being undertaken in summer when long daylight hours mean skies never get truly dark.

Encouragingly, car touring has fallen from 22% in 2011 to 12% in 2016, although car usage remains high overall as a mode of transport during visits (92% of respondents).

Motivations to Visit and Visitor Satisfaction

Previous experience is key in influencing decisions to visit the North York Moors (see Chart 4). With previous experience being such a strong marketing influence on visitors, it is likely to be a challenge to expose visitors to new, different experiences through the National Park’s marketing. Future marketing activity should explore more ways to increase the propensity of visitors to promote their experience of the National Park to others.

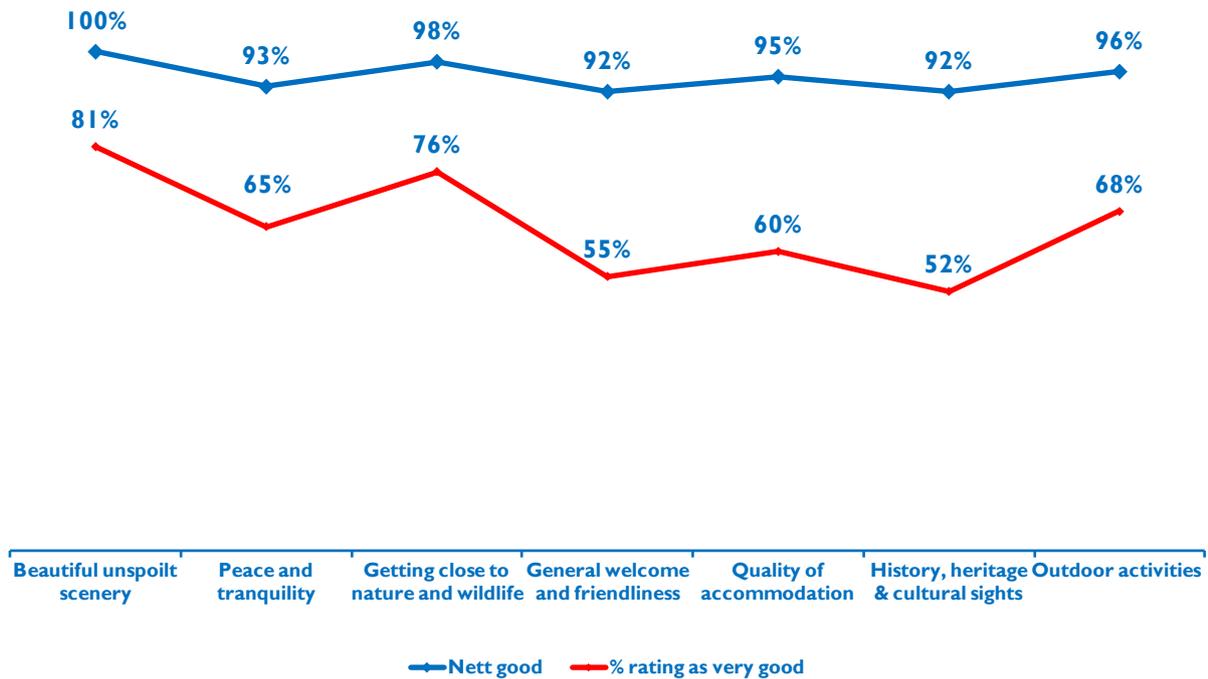
Chart 4. Information Sources Used in Decision-Making Process



The National Park's landscape is a huge draw, with key triggers to visit revolving around the unspoilt scenery, peace and tranquillity, and getting close to nature and wildlife. All three are important to 90% of respondents and they are not disappointed; 93% or more rate the North York Moors as very good/good for these experiences (see Chart 5).

The area's heritage and outdoor activity offer, while providing very good/good experiences once here (scoring 92% or more), are not the primary motivators for visits, and could be given a higher profile in future marketing activity.

Chart 5. Rating of Experience



Based on a scale of 1 to 5, with 1 being 'very poor' and 5 'very good'

There is still scope to improve the offer which should result in more visitors saying 'very good' rather than 'good' when rating their experiences.

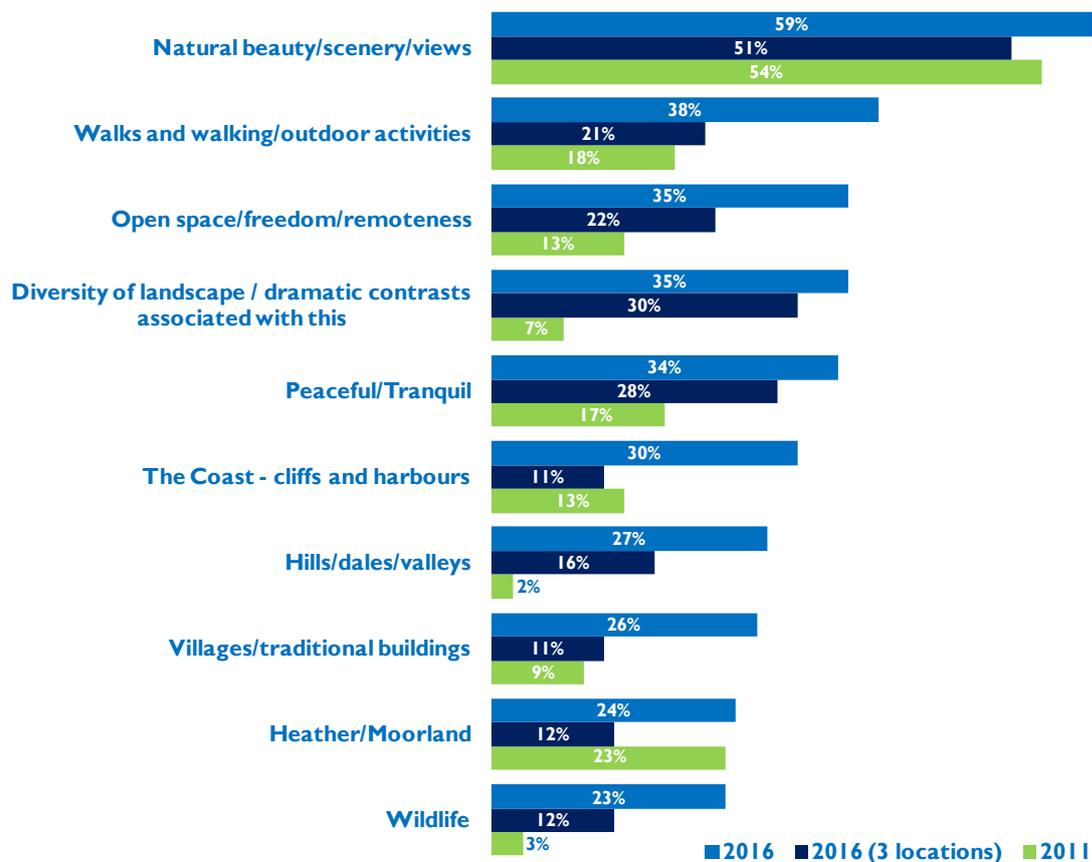
Overall, visitors' level of enjoyment of the North York Moors National Park is high, with 95% of respondents stating it was very good/good. No respondents rated their experience as 'poor' or 'very poor' while 86% rate the North York Moors as very good/good value for money.

When asked what could be done to improve the experience of their visitors, 60% of respondents said nothing.

4.4 Perceptions and Awareness of the National Park

There is much more awareness of what makes the National Park special, with visitors able to cite a wider variety of qualities than 2011, without prompting (see Chart 6).

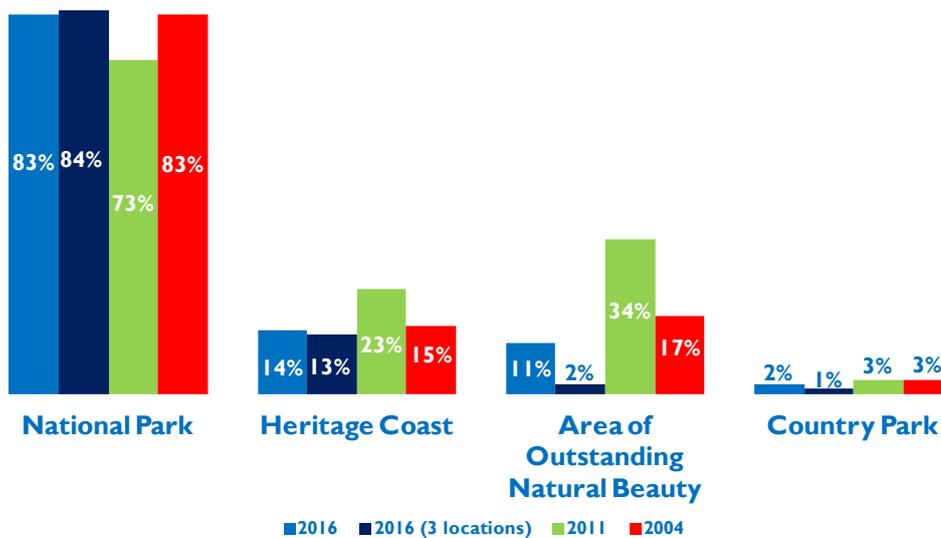
Chart 6. Generic Qualities of the North York Moors (unprompted)



34% of respondents could name three or more of the National Park's identified special qualities unprompted (vs. 18% in 2011 when restricted to the same three locations surveyed previously). When all seven locations in 2016 were included, 51% of respondents could name three or more. Five years ago, no respondents were able to name more than 5; in 2016, 20% of respondents could name at least seven.

Visitor awareness of being in a National Park has returned to levels seen in 2004, with 84% of respondents aware they were in a National Park compared to 73% in 2011. Fewer visitors now think they are in an Area of Outstanding Natural Beauty (see Chart 7).

Chart 7. Where do respondents think they are

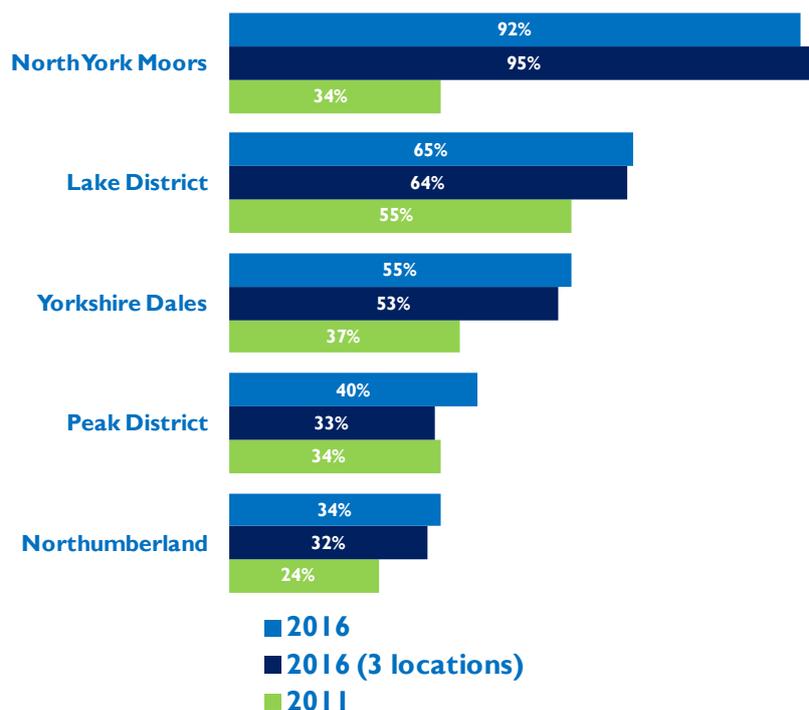


Those in Robin Hood’s Bay (37%) and Runswick Bay (27%) were more likely to think they are in a Heritage Coast, but this has fallen from a high of 63% for Runswick Bay in 2011 (where direct comparators are available).

The North York Moors status as a ‘National Park’ was an important reason to visit for half of those visiting, especially for those going to places inland who had a higher awareness that they were in a National Park.

When asked (unprompted) to name National Parks in the north of England, 92% named the North York Moors compared to just 34% in 2011, a remarkable turnaround. In fact, overall recognition of northern England’s National Parks has grown when compared to 2011 results (see Chart 8).

Chart 8. Unprompted Naming of Northern England National Parks



These results summarised in Table 2 below show that progress on Management Plan targets relating to awareness and understanding has been excellent; indeed targets for two of the three key indicators have been overwhelmingly surpassed.

Table 2: Summary of Management Plan target progress

	2004 (Actual)	2011 (Actual)	2016 (Actual)	Target 2016	Target 2021
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Please note 2016 data is taken from all seven interview locations.