

Appendix 1 – North York Moors Visitor Survey 2021

Background and methodology

This is the fourth visitor survey to be commissioned by the National Park Authority; previous surveys were conducted in 2016, 2011 and 2004.

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

Emotional Logic was commissioned to conduct the fieldwork and analysis on behalf of the Authority in July 2021. Six interview locations were used, reflecting the patterns of the previous survey in 2016 (Helmsley, Osmotherley, Robin Hood’s Bay, Runswick Bay, Sutton Bank National Park Centre and The Moors National Park Centre at Danby).

A total of 656 face-to-face interviews were undertaken in between 26 July and 5 September 2021 during ‘peak’ summer holidays, with interview shifts conducted on a mixture of weekdays and weekends. This compares to 649 interviews for the 2016 survey and 352 for the 2011 survey.

The 2021 survey was broadly similar to the 2016 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 repeated.

Overall results are accurate to +/- 4% at 95% confidence (findings are based on a sample size inside the +/- 5% standard industry error rate required to provide statistically robust findings).

Key findings

Visitor profile

Table 1 reveals a shift in the profile of visitors to the North York Moors. Previous surveys revealed the National Park appealed mainly to families with young children, and ‘post-families’ whereas in 2021, there are now slightly less ‘younger families’ and more in the ‘pre-family’ category.

Table 1: Visitor group profile by age (%)

-	Under 16	16-34	35-54	55-64	65+
2021	29	20	23	15	12
2016	28	14	29	17	13

Sample: 1,592 (based on interviewees’ total party size)

There is now an even split in age profile, with half of visitors now 34 years and under. Younger adults (16-34 category) account for 20% of visitors in a party, a 43% increase since 2016. This is likely to reflect national trends for 2021 with travel restrictions seeing

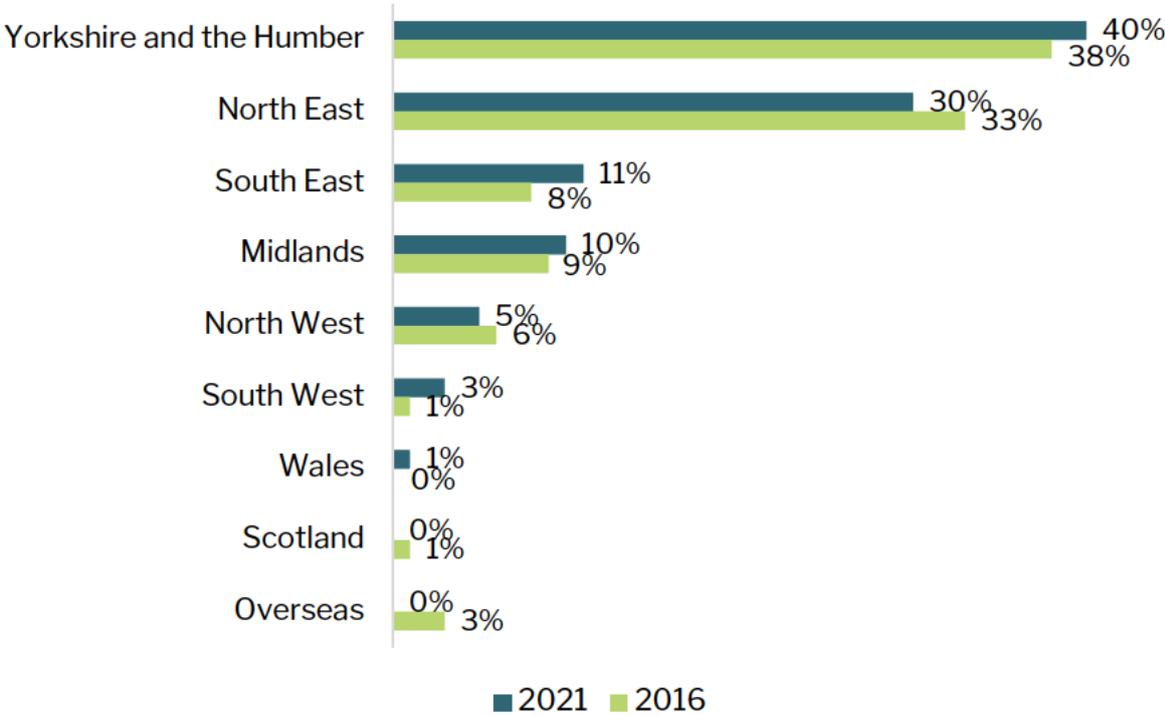
a boom in domestic holidays coupled with a growing recognition of the health & wellbeing benefits of being outdoors and an increased connection to nature.

More than 40% of respondents visited with family. A slightly higher proportion were accompanied by a spouse/partner than in 2016 (42% compared to 37% in 2016). In 2021, the average party size was 2.43 people, a fall on 3.03 in 2016.

People from black, Asian and minority ethnic backgrounds accounted for 5% of visitors in 2021, an improvement on 1% in 2016 but indicating that there is more we can do to enable everyone to enjoy the benefits that access to a National Park can bring.

The main audience for the National Park tends to be from Yorkshire and the North East. Visitors from the South East have increased by 37.5%, albeit from a small base (see Chart 1).

Chart 1: Origin of visitors

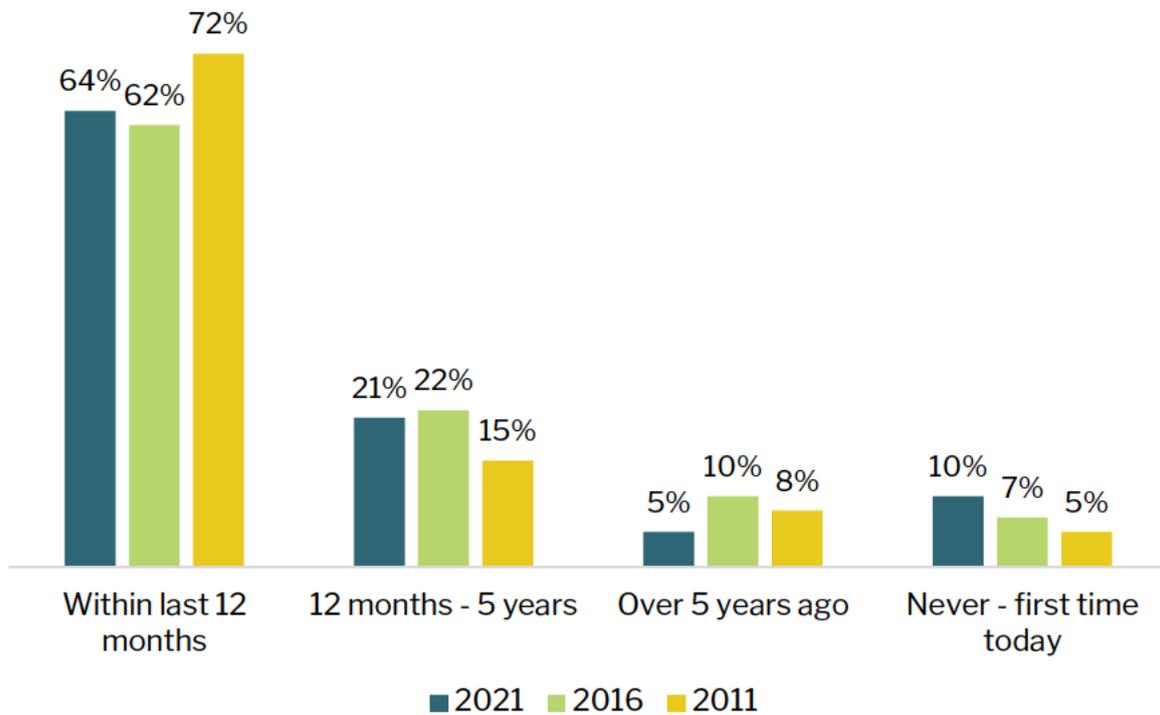


Sample: All, 656

Over half of respondents are now staying visitors, with short breaks (4 nights and under) increasing to 31% of visitors, compared to 23% in 2016 (growth of 35%), while those on a longer trip accounted for 22% of respondents. In comparison, day trips from home have fallen to 46% (vs. 54% in 2016).

The National Park continues to attract a large cohort of regular, repeat visitors (see Chart 2). First time visitors have increased slightly in 2021 compared to 2016 and are double the proportion in 2011 (10%, 7% and 5% respectively). Visitors on their first trip were more likely to be 'staying visitors'.

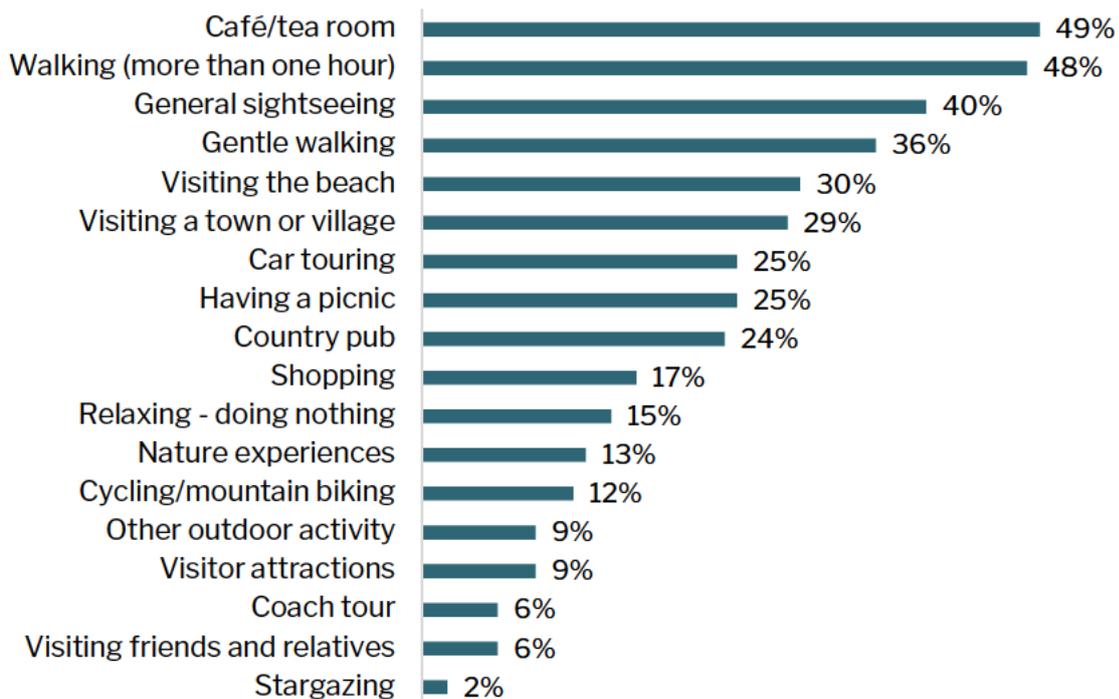
Chart 2: Previous visits to the North York Moors



Sample: All, 656

A broad variety of activities were cited by respondents, with visitors taking part in 4.4 activities on average in a day (up from 3 in 2016), indicating a wide-ranging visitor offer. In the main, visitors spend their time outdoors in the National Park, be it going for a walk (84%), visiting the beach (30%) or having a picnic (25%) (see Chart 3).

Chart 3: Activities participating or participated in during a visit



Sample: All, 656

Eating out is very popular after all that fresh air, with nearly half of those interviewed visiting a café or tea room and a further 24% frequenting a pub.

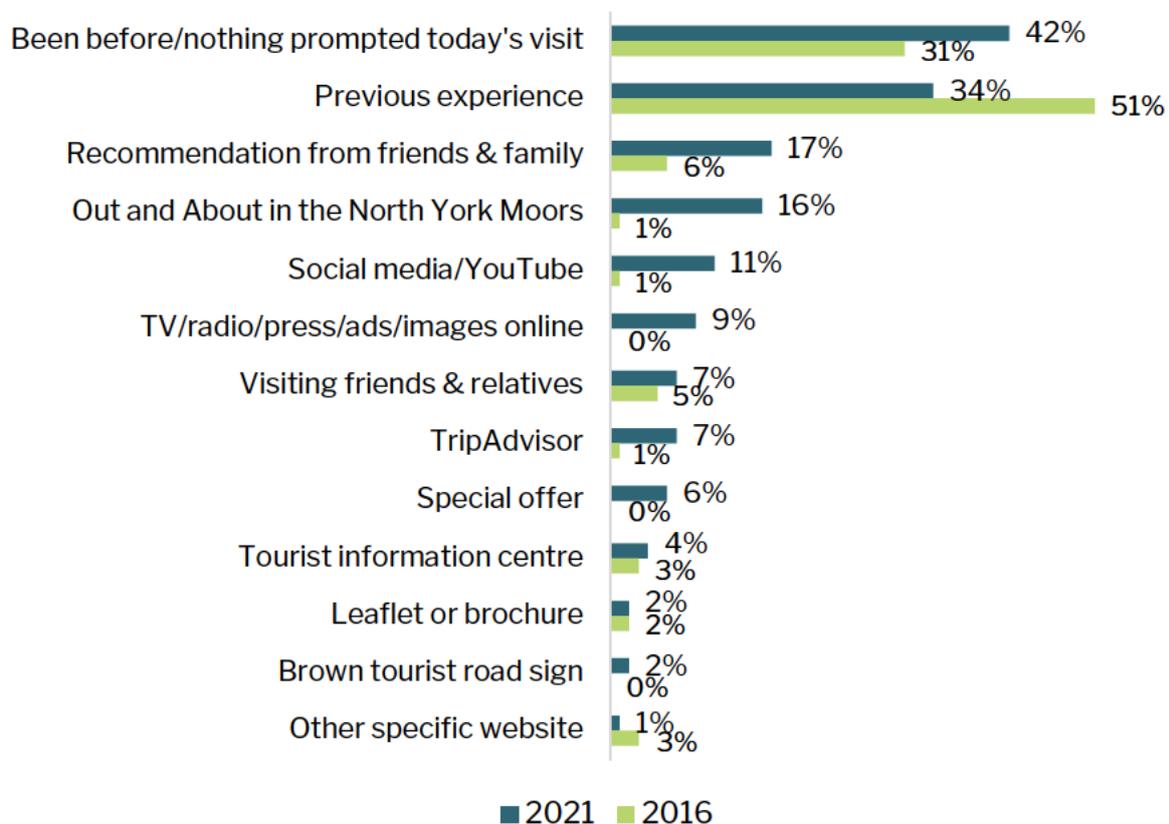
Cycling/mountain biking, visitor attractions and nature experiences have seen significant growth since 2016 (increases of 200%, 200% and 117% respectively). Stargazing has doubled to 2% since it appeared for the first time in 2016, despite the survey being undertaken in summer when long daylight hours mean skies never get truly dark.

Disappointingly car touring has more than doubled to 25% in 2021, and car usage remains high overall as a mode of transport during visits (94% of respondents). The pandemic is likely to have had an impact, with lockdowns and use of public transport discouraged initially; a return to pre-Covid travel patterns has yet to materialise.

Motivations to visit and visitor satisfaction

Previous visits/experience and word of mouth and are still the most important factors influencing decisions to visit the North York Moors. However we can now see a much wider range of influences when compared to 2016 (see Chart 4), including 16% of respondents drawing inspiration from our own publication 'Out and About in the North York Moors' (up from 1% in 2016).

Chart 4. Information sources used in decision-making process



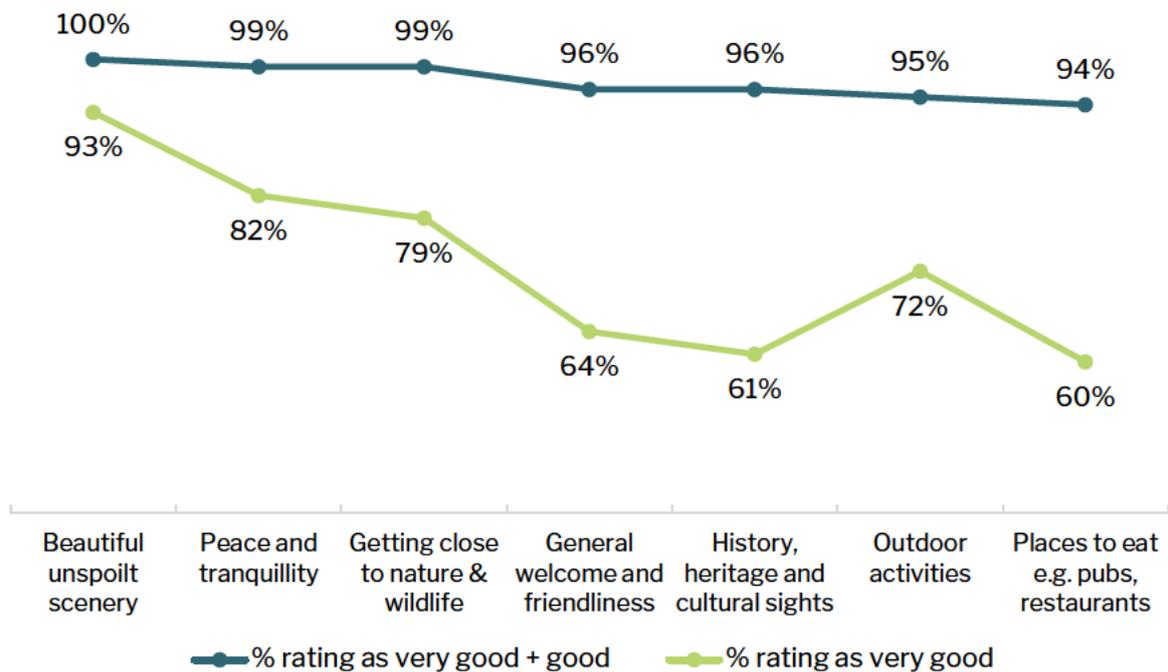
Sample: All, 656

A key finding in the previous survey was that we had a potential challenge in exposing visitors to new and/or different experiences. Since then, not only has our social media presence and activity grown exponentially, we started to work with a destination PR specialist in 2017 while 2018 saw our first fully integrated destination marketing

campaign, all ongoing activity. The significant growth in influence that social media/YouTube and TV, radio, press and advertising is likely to be in part attributed to our own increased marketing.

The National Park’s landscape is a huge draw with key triggers to visit revolving around the unspoilt scenery, getting close to nature and wildlife, and peace and tranquillity. All three are important to more than 96% of respondents and they are not disappointed; 99% or more rate the North York Moors as very good/good for these experiences (see Chart 5).

Chart 5. Rating of experience



Sample: All, 656 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.

The area’s outdoor activity offer and availability of locally sourced food & drink, while providing very good/good experiences once here (scoring 93% or more), are not the primary motivators for visits (albeit that local food availability has significantly increased in importance from 59% to 81%). Both could be given a higher profile in future marketing.

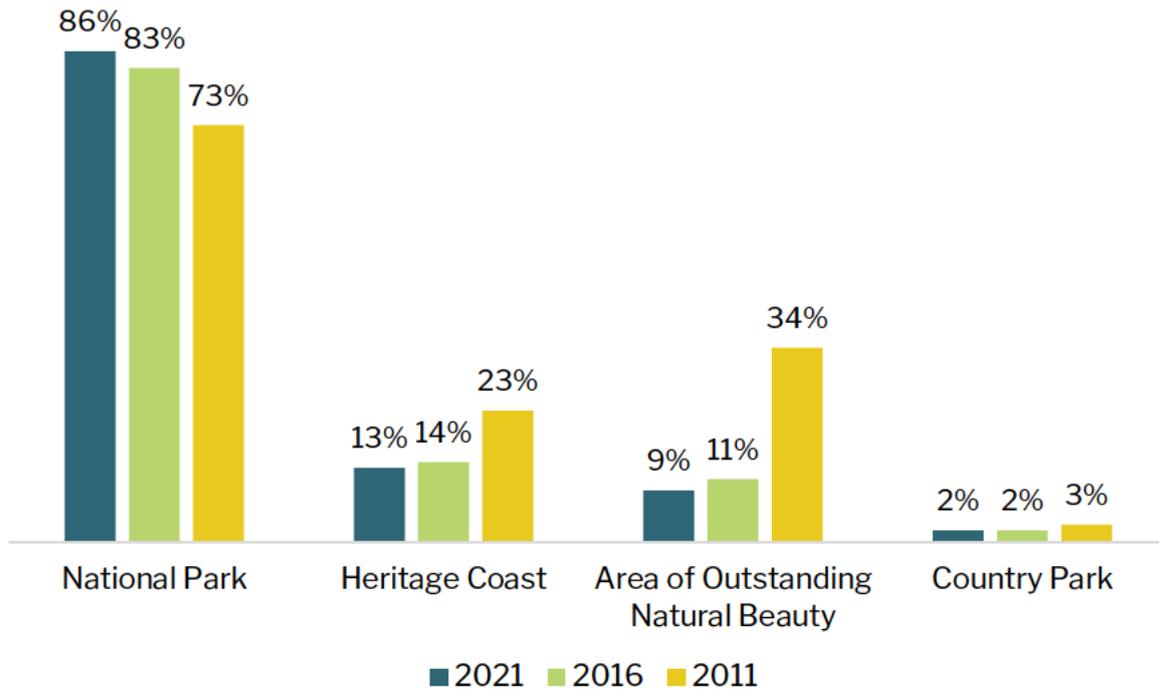
Overall, visitors’ level of enjoyment of the North York Moors National Park is high, with 92% of respondents stating it was very good, an increase from 67% in 2016. No respondents rated their experience as ‘poor’ or ‘very poor’ while 92% rate the North York Moors as very good/good value for money (compared to 86% in 2016).

When asked what could be done to improve the experience of their visitors, 54% of respondents said nothing.

Perceptions and awareness of the National Park

Visitor awareness of being in a National Park has increased slightly on 2016, with 86% 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 6).

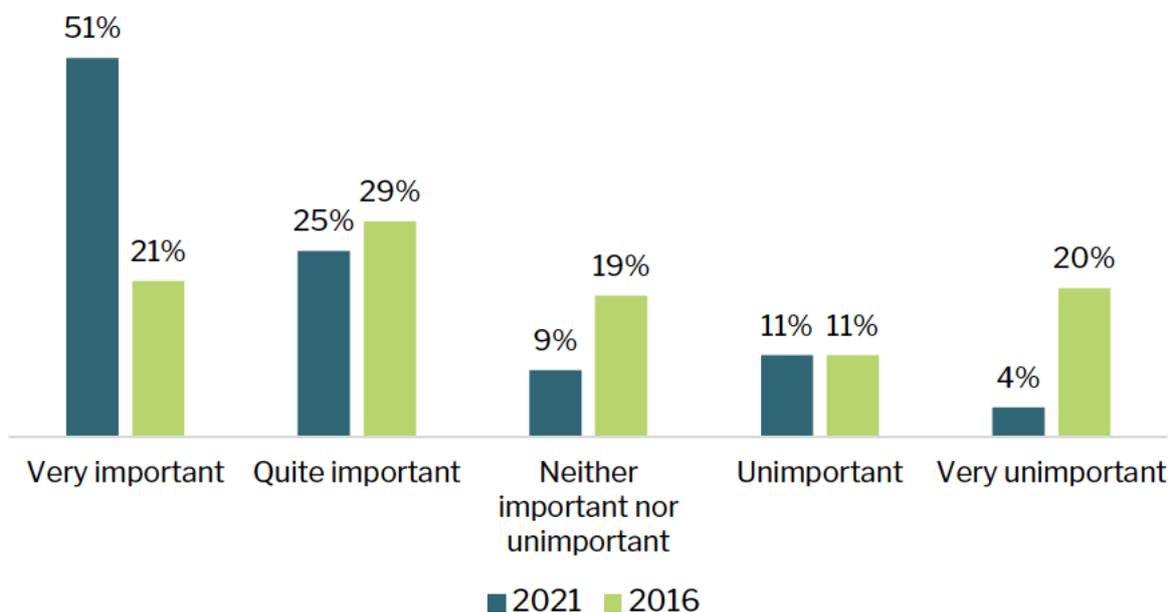
Chart 6: Where do respondents think they are



Sample: All, 656

The North York Moors status as a 'National Park' is now an important influence for 76% of respondents (vs 50% in 2016); 51% find this very important (21% previously).

Chart 7: Importance of National Park status when deciding to visit

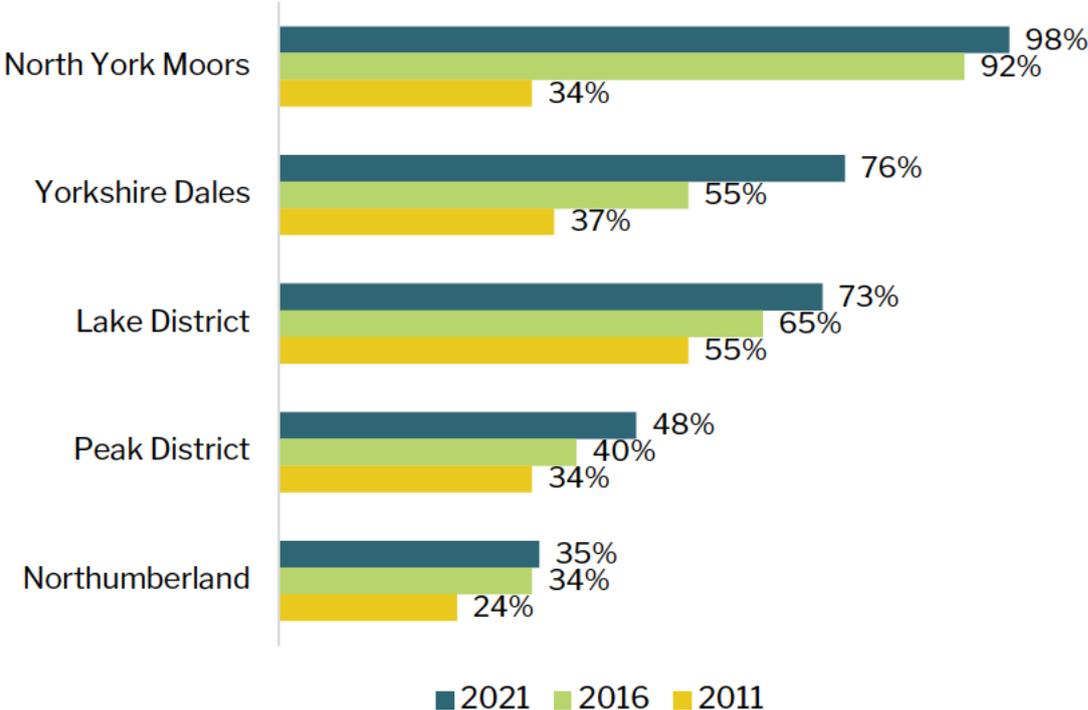


Sample: All, 656

When asked (unprompted) to name National Parks in the north of England, 98% named the North York Moors. This compares to just 34% in 2011, the year before the current Management Plan began, which highlighted the need for the Authority to work in partnership to build a clearer identity and brand.

In fact, overall recognition of northern England’s National Parks has grown, continuing a trend that could be seen in 2016 (see Chart 8).

Chart 8: Unprompted naming of northern England National Parks



Sample: All, 656