• Main aim ...

‘Conduct the North York Moors National Park Authority’s 5 year visitor survey with updates to make it relevant to the Authority’s strategy for 2016 and to inform the business plan for 2017 and beyond’

• Research objectives were to:

  – Profile visitors in terms of demographics, origin, visitor type, party size and composition, visit frequency and mode of transport
  – Establish motivations to visit and source of information used to plan trip
  – Measure activities that visitors undertake in the National Park
  – Understand visitors’ awareness and perceptions of the National Park and its special qualities
  – Measure levels of visitor satisfaction with visit
  – Gauge the level of influence that National Park status has on a visit
Method

- Face to face survey of visitors in the North York Moors National Park
- Questionnaire designed by Qa in partnership with North York Moors National Park Authority
- Undertaken August & September 2016; during ‘peak’ summer holidays
- Interview shifts conducted on a mixture of weekdays and weekends
- Only one person per group was interviewed
- Seven interview locations were used; the same three locations as the 2011 and 2004 visitor survey:
  - Osmotherley
  - Rosedale Abbey
  - Runswick Bay
- Plus four additional locations:
  - Robin Hood’s Bay
  - The Moors National Park Centre, Danby
  - Helmsley
  - Sutton Bank National Park Centre
How to read the data

• Please note that when interpreting results throughout this report not all percentages will equal 100% due to rounding (with any figures of 0.5 or higher being rounded up)

• Some questions were multiple response questions: respondents had the option of giving more than one response. These percentages may be higher than 100%

• The base (i.e. the number of people answering the question) is shown after the actual question wording, at the bottom of each slide

• Cross tabulations revealing differences that reach statistical significance are reported alongside the relevant question

• Comparisons are made with the questions which were asked in the 2011 visitor survey and the 2004 visitor survey where the results are directly comparable

• Please note that comparisons are made between the three interview locations used in previous years (Osmotherley, Rosedale Abbey, Runswick Bay) and the 2016 results as a whole. Some statistical comparisons are not possible with 2004.
Sample

- A total of 649 surveys were achieved.
- 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).
- The table below shows the spread of interview shifts and the proportion of surveys by interview location:

<table>
<thead>
<tr>
<th>Interview Location</th>
<th>No. of shifts</th>
<th>% of surveys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Osmotherley</td>
<td>7</td>
<td>17%</td>
</tr>
<tr>
<td>Rosedale Abbey</td>
<td>6</td>
<td>7%</td>
</tr>
<tr>
<td>Robin Hood's Bay</td>
<td>7</td>
<td>20%</td>
</tr>
<tr>
<td>Runswick Bay</td>
<td>7</td>
<td>20%</td>
</tr>
<tr>
<td>The Moors National Park Centre, Danby</td>
<td>4</td>
<td>8%</td>
</tr>
<tr>
<td>Helmsley</td>
<td>6</td>
<td>16%</td>
</tr>
<tr>
<td>Sutton Bank National Park Centre</td>
<td>4</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>41</strong></td>
<td><strong>649</strong></td>
</tr>
</tbody>
</table>

An additional interview shift was conducted at Robin Hood’s Bay due to the poor weather conditions on one of the previous interview shifts.
Visitor Profile
Very high proportion from white ethnic groups in visitor profile

52% Male
48% Female

51% of population in England & Wales are Female.
49% are Male.

99% of white ethnicity

1% from ethnic minority group

14% of population in England & Wales are from other ethnic groups

Q21. Gender Base: 649
Q22. Do you consider yourself to be a member of a minority ethnic group? Base: 649
All national averages based on Census 2011 for England & Wales
Higher proportion of under 16’s and 35-64 year olds than national average

93%
Had no long standing health issue or disability.
In 2011 it was 93%
England & Wales average is 82.4%.
North York Moors appealing mainly to families & post families in 2016

Q12. Who are you visiting with today? Base: 649
Q13. Including yourself, how many people are in your party today? Base: 649

Lifestage based on party composition (pre family – no kids, all under 34, young family i.e. have only kids 0-10 in group, older family i.e. kids 11-15 only in group, mixed family i.e. kids both 0-10 and 11-15 in group, post family i.e. adults over 35 no kids in group)

3.03
Is the average party size
In 2011 it was 3.36
In 2004 it was 3.35

55%
Post family

22%
Younger family

9%
Pre family

6%
Older family

8%
Mixed family
Q24. What is your postcode? Or country of residence if visiting from overseas?

Base: 634

Increase in visitors from North East & North West

- **Yorkshire And The Humber**
  - 2016: 38%
  - 2011: 48%

- **North East**
  - 2016: 33%
  - 2011: 27%

- **Midlands**
  - 2016: 9%
  - 2011: 9%

- **South East (inc. London)**
  - 2016: 8%
  - 2011: 9%

- **North West**
  - 2016: 6%
  - 2011: 4%

- **Overseas**
  - 2016: 3%
  - 2011: 2%

- **South West**
  - 2016: 1%
  - 2011: 1%

- **Scotland**
  - 2016: 1%
  - 2011: 0%

- **Wales**
  - 2016: 0%
  - 2011: 1%

**22%**
Are visiting from North Yorkshire

**5%**
Are visiting from County Durham
Visitor Behaviour
Over half of visitors on a day visit from home

Q1. Are you on...? day visit from home / short break (4 nights & under) / longer holiday? Base: 649

- Day visit from home: 54%
- Short break (4 nights & under): 23%
- Longer holiday: 22%

45% staying overnight
Day visitors are more likely to be...

- Living in Yorkshire: 43%
- Living in North East: 50%
- Visited within the last 12 months: 75%
- Post family: 51%
- Visiting without children: 66%

Q1. Are you on...? day visit from home / short break (4 nights and under) / longer holiday? Base: 351
Visitors on a short break are more likely to be...

- Staying in serviced accom.: 45%
- Post family: 58%
- Rest of UK: 55%
- Yorkshire: 41%
- Visited within last 12 months: 53%
- Visiting without children: 76%

Q1. Are you on...? day visit from home / short break (4 nights and under) / longer holiday? Base: 152
Visitors on a longer holiday are more likely to be... 

- Staying in self catering: 50%
- Visiting within last 12 months: 40%
- Living in rest of UK: 66%

Q1. Are you on...? day visit from home/ short break (4 nights and under) / longer holiday? Base: 146
Q1. Are you on...? day visit from home/short break (4 nights and under)/longer holiday

- **Day visit from home**
  - 2016: 54%
  - 2016 (3 locations): 60%
  - 2011: 48%
  - 2004: 58%

- **Short break (4 nights & under)**
  - 2016: 23%
  - 2016 (3 locations): 20%
  - 2011: 32%
  - 2004: 24%

- **Longer holiday**
  - 2016: 22%
  - 2016 (3 locations): 20%
  - 2011: 20%
  - 2004: 18%

Number of day & overnight visitors return to similar levels seen in 2004.
High proportion of repeat visitors on a day visit and from Yorkshire

Within last 12 months: 62%
12 months - 5 years: 22%
Over 5 years ago: 10%
Never - first time today: 7%

Those visiting from Yorkshire (77%) & on a day visit from home (75%) are more likely to have visited in last 12 months than over 12 months ago.

Potential to attract more first time visitors

Q5. Before today, when was the last time you visited the North York Moors?
Base: 649
Proportion of recent visitors has declined very slightly since 2011

Q5. Before today, when was the last time you visited the North York Moors?

Base: 649 / 291 / 352
Large proportion of visitors frequently visited North York Moors National Park in the last year

- Question only asked to those who have visited in the last 12 months

Q5b. Approximately, how many times have you visited in the last twelve months?
Base: 400

- 11% Once before
- 32% 2-3 times
- 14% 4-5 times
- 20% 6-10 times
- 12% 11-20 times
- 11% 20+ times

2 is the mode number of times respondents had visited in last 12 months
### Q10. What activities have you or will you participate in during your visit today?

**Prompted. Base: 649**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cafe / tea room</td>
<td>50%</td>
</tr>
<tr>
<td>Walking (more than one hour)</td>
<td>39%</td>
</tr>
<tr>
<td>Visiting the beach</td>
<td>35%</td>
</tr>
<tr>
<td>Walking (less than one hour)</td>
<td>35%</td>
</tr>
<tr>
<td>General sightseeing</td>
<td>32%</td>
</tr>
<tr>
<td>Having a picnic</td>
<td>22%</td>
</tr>
<tr>
<td>Country pub</td>
<td>21%</td>
</tr>
<tr>
<td>Shopping</td>
<td>13%</td>
</tr>
<tr>
<td>Car touring</td>
<td>12%</td>
</tr>
<tr>
<td>The Moors National Park Centre</td>
<td>8%</td>
</tr>
<tr>
<td>Nature reserve / wildlife</td>
<td>6%</td>
</tr>
<tr>
<td>Sutton Bank National Park Centre</td>
<td>4%</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>4%</td>
</tr>
<tr>
<td>Cycling</td>
<td>4%</td>
</tr>
<tr>
<td>Visitor attractions</td>
<td>3%</td>
</tr>
<tr>
<td>Special events</td>
<td>1%</td>
</tr>
<tr>
<td>Star gazing</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
</tbody>
</table>

Walking and visiting the beach also popular activities.

The average number of activities that visitors had or will participate in is **2.97**.

Rievaulx Terrace was the most frequently cited attraction.

Other activities included water sports such as sailing, kayaking and swimming.
Slight decline in visitors walking in 2016

Q10. What activities have you or will you participate in during your visit today?

Prompted. Base: 649 / 352

- Walking (more than one hour): 2016 (3 locations) 41%, 2011 39%
- Visiting the beach: 2016 (3 locations) 21%, 2011 18%
- Walking (less than one hour): 2016 (3 locations) 32%, 2011 31%
- Country pub: 2016 (3 locations) 37%, 2011 28%
- Shopping: 2016 (3 locations) 12%, 2011 7%
- Car touring: 2016 (3 locations) 22%, 2011 17%
- Cycling: 2016 (3 locations) 6%, 2011 3%
- Visitor attractions: 2016 (3 locations) 11%, 2011 9%
- Special events: 2016 (3 locations) 0%, 2011 1%
- Mountain biking: 2016 (3 locations) 1%, 2011 0%
- Other: 2016 (3 locations) 22%, 2011 5%
Very high proportion are car users

Q9. What type of transport have you used or will you use today? Base: 649

- **Car**: 92%
- **Foot**: 9%
- **Public bus**: 2%
- **Cycle**: 2%
- **Coach**: 1%
- **Motorcycle**: 1%
- **Train (Excl. NYM Railway)**: 1%

More likely to have no children in their party (10%)
Q9. What type of transport have you used or will you use today? Base: 649 / 291 / 352 / 402

Proportion of car users return to the same levels as 2004

- **Car**: 2016 (92%), 2016 (3 locations) (93%), 2011 (83%), 2004 (93%)
- **Foot**: 2016 (9%), 2016 (3 locations) (16%), 2011 (28%), 2004 (28%)
- **Public bus**: 2016 (2%), 2016 (3 locations) (6%), 2011 (5%), 2004 (1%)
- **Cycle**: 2016 (2%), 2016 (3 locations) (1%), 2011 (6%), 2004 (1%)
- **Coach**: 2016 (1%), 2016 (3 locations) (1%), 2011 (1%), 2004 (1%)
- **Motorcycle**: 2016 (3%), 2016 (3 locations) (2%), 2011 (1%), 2004 (1%)
- **Train (Excl. NYM Railway)**: 2016 (1%), 2016 (3 locations) (1%), 2011 (1%), 2004 (1%)
- **Other**: 2016 (3%), 2016 (3 locations) (3%), 2011 (3%), 2004 (3%)
Digital technology not used by many visitors during visit

Mapping and websites most popular especially amongst overnight visitors (22%)

<table>
<thead>
<tr>
<th>Technology</th>
<th>Not Much</th>
<th>A Lot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google maps</td>
<td>82%</td>
<td>16%</td>
</tr>
<tr>
<td>Websites</td>
<td>84%</td>
<td>13%</td>
</tr>
<tr>
<td>Geocaching or GPS devices</td>
<td>85%</td>
<td>14%</td>
</tr>
<tr>
<td>Twitter and Facebook</td>
<td>92%</td>
<td>6%</td>
</tr>
<tr>
<td>Trip Advisor</td>
<td>93%</td>
<td>5%</td>
</tr>
<tr>
<td>Apps</td>
<td>93%</td>
<td>4%</td>
</tr>
<tr>
<td>E-books</td>
<td>95%</td>
<td>2%</td>
</tr>
<tr>
<td>Flickr, Pinterest, Instagram</td>
<td>95%</td>
<td>2%</td>
</tr>
<tr>
<td>QR codes</td>
<td>96%</td>
<td>1%</td>
</tr>
<tr>
<td>YouTube or Vine</td>
<td>97%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Weather (eg. Accuweather) most cited type of app 95%

81% of UK adult population own a smartphone

Q11. How much have you used or will you use the following digital technologies during your visit to the North York Moors?

Base: 649. Chart does not show middle rating & can’t say. Chart in ranked order based on highest who said nett ‘a lot’ to lowest nett ‘not much’. Smart phone % according to Deloitte.
North York Moors National Park has a potential challenge in exposing visitors to new, different experiences.

Q8. What sources of information helped inspire your decision to visit the North York Moors? Prompted. Base: 649

- Previous experience: 51%
- Been before & nothing specifically prompted today’s visit: 31%
- Recommendation from friends & family: 6%
- Visiting friends and relatives: 5%
- Other specific website: 3%
- Tourist Information Centre: 3%
- Leaflet or brochure: 2%
- Social media: 1%
- The NYM Out and About Guide: 1%
- Trip Advisor: 1%
- Other: 2%

Those who said previous experience most likely to be on a day visit from home (62%)

More likely to be first time visitors (26% / 21%)

Websites listed were North York Moors National Park, National Trust, Welcome to Yorkshire

Passing by & coast to coast walk information were other sources of information

Several other prompted sources received 0%:
- Radio, TV, Film
- Magazine or newspaper
- Advertisement
- YouTube videos
- Brown tourist signs
- Images online
- A special offer
Q7. In your decision to visit the North York Moors, how important was the fact that this area is a National Park? Base: 632 (excluding don’t know)

National Park status influences half of visitors to visit

Visitors saying important (nett) are more likely to be:
• Day visitors from home (53%)
• Visiting Danby (74%), Osmotherley (69%), Helmsley (69%)

Those saying unimportant (nett) are more likely to be:
• Overnight visitors (37%)
• Visiting Runswick Bay (50%) & Robin Hood’s Bay (49%)

- Very important: 21%
- Quite important: 29%
- Neither important nor unimportant: 19%
- Unimportant: 11%
- Very unimportant: 20%
A variety of key triggers to visiting which should have a high profile in future marketing

- Blue line shows percentage rating factor as nett important, red line shows very important
- Factors shown in ranked order based on highest to lowest nett important factors

Q14. On a scale of 1 to 5, how important are each of the following when visiting the North York Moors on a day trip or overnight stay? Base: 649 (For quality of accommodation response the data is cut by those who stayed overnight – 292)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Nett Important</th>
<th>% Rating as Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beautiful unspoilt scenery</td>
<td>98%</td>
<td>28%</td>
</tr>
<tr>
<td>Peace and tranquility</td>
<td>95%</td>
<td>72%</td>
</tr>
<tr>
<td>Getting close to nature and wildlife</td>
<td>93%</td>
<td>72%</td>
</tr>
<tr>
<td>General welcome and friendliness</td>
<td>89%</td>
<td>56%</td>
</tr>
<tr>
<td>Quality of accommodation</td>
<td>86%</td>
<td>44%</td>
</tr>
<tr>
<td>History, heritage &amp; cultural sights</td>
<td>85%</td>
<td>60%</td>
</tr>
<tr>
<td>Outdoor activities</td>
<td>84%</td>
<td></td>
</tr>
</tbody>
</table>
Still many important motivators for visitors in second half of the list

Q14. On a scale of 1 to 5, how important are each of the following when visiting the North York Moors on a day trip or overnight stay? Base: 649
Very high proportion staying in the North York Moors, for 2-7 nights

- Question only asked to those staying overnight

4.96 is the average number of nights spent in the North York Moors by overnight visitors

Q2. In total, how nights will you be... in North York Moors / elsewhere in Yorkshire? Base: 292 (all those staying overnight during trip)
Visitors use a variety of accommodation types when visiting North York Moors

- Question only asked to those staying overnight

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self catering (non-holiday park)</td>
<td>31%</td>
</tr>
<tr>
<td>B&amp;B or guesthouse</td>
<td>18%</td>
</tr>
<tr>
<td>Camping</td>
<td>13%</td>
</tr>
<tr>
<td>Touring caravan</td>
<td>9%</td>
</tr>
<tr>
<td>Hotel</td>
<td>8%</td>
</tr>
<tr>
<td>Staying with friends/relatives</td>
<td>7%</td>
</tr>
<tr>
<td>Static caravan – owned</td>
<td>4%</td>
</tr>
<tr>
<td>Self catering (holiday park)</td>
<td>3%</td>
</tr>
<tr>
<td>Inn or pub</td>
<td>3%</td>
</tr>
<tr>
<td>Static caravan – rented</td>
<td>3%</td>
</tr>
<tr>
<td>Farm house stay</td>
<td>1%</td>
</tr>
<tr>
<td>Youth hostel</td>
<td>1%</td>
</tr>
</tbody>
</table>

More likely to be visiting with children (40%) and from outside Yorkshire (35%)

Nearly 1 in 4 visiting with children (24%)

More likely to have visited in last 12 months (14%)

Q3. What type of accommodation are you staying in during this visit?
Base: 271 (only asked if staying overnight)
Visitors spending money on a variety of accommodation, with serviced accommodation bringing in most spend per person.

<table>
<thead>
<tr>
<th></th>
<th>All accommodation</th>
<th>Serviced</th>
<th>Self - catering</th>
<th>Caravan / camping</th>
<th>Hostels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated cost per trip per group (£)</td>
<td>£351.71</td>
<td>£341.92</td>
<td>£599.77</td>
<td>£154.21</td>
<td>£206.67</td>
</tr>
<tr>
<td>Estimated cost per group per night (£)</td>
<td>£69.61</td>
<td>£98.79</td>
<td>£91.76</td>
<td>£33.24</td>
<td>£49.52</td>
</tr>
<tr>
<td>Estimated cost per person per night (£)</td>
<td>£28.35</td>
<td>£48.46</td>
<td>£32.25</td>
<td>£11.61</td>
<td>£16.98</td>
</tr>
</tbody>
</table>

Q4. What is the total cost of you and your party’s accommodation during your stay in North York Moors? Base: 271 Question only asked to those staying overnight.
Perceptions and awareness of the National Park
High amount of visitors recognise they are in a National Park

Q6. Do you think you are currently in?
Base: 649

- **National Park**: 83%
  - Those interviewed inland more likely to think they are in a National Park.
  - 63% in Robin Hood’s Bay & 69% in Runswick Bay thought they were in a National Park.

- **A Heritage Coast**: 14%
  - Those in Robin Hood’s Bay (37%), Runswick Bay (27%) more likely to think they are in a Heritage Coast than other interview locations. In Runswick Bay in 2011, 63% were more likely to think they are in a Heritage Coast.

- **Area of Outstanding Natural Beauty (AONB)**: 11%
  - Those in Robin Hood’s Bay (31%) more likely to think they are in an AONB.

- **Country Park**: 2%

Q6. Do you think you are currently in?
Base: 649
Visitor awareness of being in a National Park returns to levels seen in 2004

Q6. Do you think you are currently in?
Base: 649 / 291 / 349

Less visitors now think they are in an AONB
Generic qualities of the North York Moors cited most frequently

- Shown in rank order of unprompted responses from most to least mentioned

<table>
<thead>
<tr>
<th>Quality</th>
<th>Unprompted</th>
<th>Prompted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural beauty / scenery / views</td>
<td>59%</td>
<td>18%</td>
<td>77%</td>
</tr>
<tr>
<td>Walks and walking / outdoor activities</td>
<td>38%</td>
<td>16%</td>
<td>54%</td>
</tr>
<tr>
<td>Open space / freedom / remoteness</td>
<td>35%</td>
<td>20%</td>
<td>55%</td>
</tr>
<tr>
<td>Diversity of landscape / dramatic contrasts</td>
<td>35%</td>
<td>1%</td>
<td>51%</td>
</tr>
<tr>
<td>Peaceful / tranquil</td>
<td>34%</td>
<td>10%</td>
<td>44%</td>
</tr>
<tr>
<td>The Coast - cliffs and harbours</td>
<td>30%</td>
<td>9%</td>
<td>39%</td>
</tr>
<tr>
<td>Hills / dales / valleys</td>
<td>27%</td>
<td>15%</td>
<td>42%</td>
</tr>
<tr>
<td>Village / traditional buildings</td>
<td>26%</td>
<td>6%</td>
<td>32%</td>
</tr>
<tr>
<td>Heather / moorland</td>
<td>24%</td>
<td>17%</td>
<td>41%</td>
</tr>
<tr>
<td>Wildlife</td>
<td>23%</td>
<td>10%</td>
<td>33%</td>
</tr>
</tbody>
</table>
Unique qualities of the North York Moors cited by fewer visitors – are these qualities which should be promoted more?

Q15a. & Q15b. With regard to the North York Moors, what do you see as the quality of the North York Moors that makes it special to you?

Base: 649 First asked spontaneously then using a prompted list.

- Woodland / forest: Unprompted 21%, Prompted 14%, Total 35%
- Clean/unpolluted / dark skies: Unprompted 18%, Prompted 7%, Total 25%
- Religious past / Abbeys / Churches: Unprompted 9%, Prompted 4%, Total 13%
- Special landforms from the ice age / geology: Unprompted 8%, Prompted 6%, Total 14%
- Strong sense of community: Unprompted 6%, Prompted 7%, Total 13%
- Archaeology: Unprompted 5%, Prompted 2%, Total 7%
- Artistic, scientific and literary inspiration: Unprompted 4%, Prompted 4%, Total 8%
- Dialects / customs / songs: Unprompted 2%, Prompted 1%, Total 3%
- Other: Unprompted 1%, Prompted 1%
Visitors in 2016 could cite a wider variety of qualities than in 2011, without prompting

<table>
<thead>
<tr>
<th>Quality</th>
<th>2016</th>
<th>2016 (3 locations)</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural beauty/scenery/views</td>
<td>59%</td>
<td>51%</td>
<td>54%</td>
</tr>
<tr>
<td>Walks and walking/outdoor activities</td>
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</tr>
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<td>35%</td>
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<td>3%</td>
</tr>
<tr>
<td>Peaceful/Tranquil</td>
<td>34%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>The Coast - cliffs and harbours</td>
<td>30%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Hills/dales/valleys</td>
<td>27%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Villages/traditional buildings</td>
<td>26%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Heather/Moorland</td>
<td>24%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Wildlife</td>
<td>12%</td>
<td>23%</td>
<td></td>
</tr>
</tbody>
</table>

Q15a. With regard to the North York Moors, what do you see as the quality of the North York Moors that makes it special to you? Unprompted.
Base: 649 / 291/ 352
More qualities cited by visitors in 2016 than in 2011

Q15a. With regard to the North York Moors, what do you see as the quality of the North York Moors that makes it special to you?

Base: 649 / 291 / 352

- Woodland/forest: 21% in 2016, 7% in 2016 (3 locations), 1% in 2011
- Clean/unpolluted/dark skies: 18% in 2016, 7% in 2016 (3 locations), 3% in 2011
- Religious past / Abbeys / Churches: 9% in 2016, 3% in 2016 (3 locations), 1% in 2011
- Special landforms from the ice age/geology: 8% in 2016, 1% in 2016 (3 locations), 2% in 2011
- Strong sense of community: 6% in 2016, 2% in 2016 (3 locations), 1% in 2011
- Dialects/customs, artistic, scientific and literary inspiration: 6% in 2016, 3% in 2016 (3 locations), 5% in 2011
- Archaeology: 5% in 2016, 1% in 2016 (3 locations), 1% in 2011
- Other: 1% in 2016, 1% in 2016 (3 locations), 6% in 2011
Q15a. With regard to the North York Moors, what do you see as the quality of the North York Moors that makes it special to you?

(Unprompted. Base: 649 / 291 / 352

<table>
<thead>
<tr>
<th>Number of qualities</th>
<th>2016 (all locations)</th>
<th>2016 (3 locations)</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>1</td>
<td>26%</td>
<td>40%</td>
<td>42%</td>
</tr>
<tr>
<td>2</td>
<td>23%</td>
<td>27%</td>
<td>37%</td>
</tr>
<tr>
<td>3</td>
<td>12%</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Nett 3+</td>
<td>51%</td>
<td>34%</td>
<td>18%</td>
</tr>
<tr>
<td>4</td>
<td>8%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>5</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>6</td>
<td>4%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>7+</td>
<td>20%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>Mean</td>
<td>4.06</td>
<td>2.41</td>
<td>1.76</td>
</tr>
</tbody>
</table>

Overall few visitor differences by visitor type. Those saying more than 3 qualities unprompted are more likely to be:
- An overnight visitor (56%)
- Pre family lifestage (69%)
- From Yorkshire & Humber (58%)

Those saying less than 3 qualities unprompted are more likely to be:
- A day visitor (54%)
North York Moors and Lakes most frequently named
National Parks

North York Moors 92%

Lake District 65%

Yorkshire Dales 55%

Peak District 40%

Northumberland 34%

None / don't know 3%

Other 3%

Visitors naming Yorkshire Dales more likely to be:
• Previous North York Moors visitors (56%)
• Aged 65+(68%)
• Without children (61%)

Visitors naming Northumberland more likely to be:
• Previous North York Moors visitors (35%)
• Aged 65+(46%)
• Without children (37%)

Q18. Which northern England National Parks can you name? Unprompted.
Base: 649
Q18. Which northern England National Parks can you name? Unprompted.

Base: 649 / 291 / 352

2016
2016 (3 locations)
2011

North York Moors
- 95% (2016)
- 92% (2016)
- 34% (2011)

Lake District
- 65% (2016)
- 64% (2016)
- 55% (2011)

Yorkshire Dales
- 55% (2016)
- 53% (2016)
- 37% (2011)

Peak District
- 40% (2016)
- 33% (2016)
- 34% (2011)

Northumberland
- 34% (2016)
- 32% (2016)
- 24% (2011)

None / don't know
- 3% (2016)
- 2% (2016)
- 7% (2011)

Other
- 3% (2016)
- 22% (2011)
Experiences
Ratings are high for most experiences (over 90% nett good) but still potential to go from good to very good

- Rating of different factors amongst those who rated these as important (see page 28 & 29)
- Nett good = those who stated good + very good
- Factors in ranked order of how important when visiting the North York Moors amongst all visitors
- Figures calculated from all of those who gave a rating excluding don’t know but data only shows those who gave a positive rating

Q17. On a scale of 1 to 5 with 1 being ‘very poor’ and 5 ‘very good’, how would you rate your experiences of visiting North York Moors on a day trip or overnight stay? Base: varies as only those who said factor was nett important

<table>
<thead>
<tr>
<th>Beautiful unspoilt scenery</th>
<th>Peace and tranquility</th>
<th>Getting close to nature and wildlife</th>
<th>General welcome and friendliness</th>
<th>Quality of accommodation</th>
<th>History, heritage &amp; cultural sights</th>
<th>Outdoor activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>93%</td>
<td>98%</td>
<td>92%</td>
<td>95%</td>
<td>92%</td>
<td>96%</td>
</tr>
<tr>
<td>81%</td>
<td>65%</td>
<td>76%</td>
<td>55%</td>
<td>60%</td>
<td>52%</td>
<td>68%</td>
</tr>
</tbody>
</table>
Quality of accommodation rated very highly but some experiences like WiFi & phone coverage could be improved

Q17. On a scale of 1 to 5 with 1 being 'very poor' and 5 'very good', how would you rate your experiences of visiting North York Moors on a day trip or overnight stay? Base: varies as only those who said factor was nett important

- Places to eat such as pubs, restaurants and cafes: 94%
- Beaches and seaside resorts: 88%
- Availability of locally sourced food and drink: 85%
- Range of attractions, events & entertainments: 75%
- Visit to the National Park Centres: 84%
- WiFi or mobile phone coverage when out and about: 50%
- Visitor information provided by mobile info. centre: 74%
- Availability of locally sourced food and drink: 43%
- Range of attractions, events & entertainments: 39%
- Visit to the National Park Centres: 36%
- WiFi or mobile phone coverage when out and about: 40%
- Visitor information provided by mobile info. centre: 37%

Nett good: % rating as very good
Those experiences deemed as important rated positively

- Percentages below compare importance against actual performance
- Blue circle shows those who said factor was nett important (important or very) when visiting North York Moors (see page 28 & 29)
- Factors in ranked order of how important when visiting North York Moors amongst all visitors
- Red and green circles shows how many of those who said factor was important rated actual experience as good or very good (red = under 90% and green =90%+)

Q17. On a scale of 1 to 5 with 1 being ‘very poor’ and 5 ‘very good’, how would you rate your experiences of visiting North York Moors on a day trip or overnight stay? Base: 649 (excluding don’t knows). For quality of accommodation response the importance data for Q14 is cut by those who stayed overnight – 292

<table>
<thead>
<tr>
<th>factor</th>
<th>importance</th>
<th>actual experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beautiful unspoilt scenery</td>
<td>98%</td>
<td>100%</td>
</tr>
<tr>
<td>Peace &amp; tranquillity</td>
<td>95%</td>
<td>93%</td>
</tr>
<tr>
<td>Getting close to nature</td>
<td>93%</td>
<td>98%</td>
</tr>
<tr>
<td>General welcome and friendliness</td>
<td>89%</td>
<td>92%</td>
</tr>
<tr>
<td>Quality of accommodation</td>
<td>86%</td>
<td>95%</td>
</tr>
<tr>
<td>History, heritage &amp; cultural sights</td>
<td>85%</td>
<td>92%</td>
</tr>
<tr>
<td>Outdoor Activities</td>
<td>84%</td>
<td>96%</td>
</tr>
</tbody>
</table>
Still high ratings for less important factors

- Percentages below compare importance against actual performance
- Blue circle shows those who said factor was nett important (important or very) when visiting North York Moors (see page 28 & 29)
- Factors in ranked order of how important when visiting North York Moors amongst all visitors
- Red and green circles shows how many of those who said factor was important rated actual experience as good or very good (red = under 90% and green =90%+)

Q17. On a scale of 1 to 5 with 1 being 'very poor' and 5 'very good', how would you rate your experiences of visiting North York Moors on a day trip or overnight stay? Base: 649 (excluding don’t knows)
Visitors are positive about their North York Moors experience

- **67%** Very good
- **28%** Good
- **4%** Neither / nor

Visitors saying very good more likely to be:
- Staying with friends/relatives (89%)
- Visiting with children (75%)

No respondent rated their experience as ‘poor’ or ‘very poor’

Q17. On a scale of 1 to 5 with 1 being ‘very poor’ and 5 ‘very good’, how would you rate your experiences of visiting North York Moors on a day trip or overnight stay? Experience of visiting this location today Base: 649
Q17. On a scale of 1 to 5 with 1 being ‘very poor’ and 5 ‘very good’, how would you rate your experiences of visiting North York Moors on a day trip or overnight stay? Experience of visiting this location today Base: Varies by location (excluding can’t say / don’t know)
A majority find North York Moors value for money

Q17. On a scale of 1 to 5 with 1 being ‘very poor’ and 5 ‘very good’, how would you rate your experiences of visiting North York Moors on a day trip or overnight stay? Value for money Base: 636 (excluding can’t say / don’t know)

- **Very good**: 41%
- **Good**: 45%
- **Neither / nor**: 14%

Visitors saying very good are more likely to be:
- With children (54%)
- Male (44%)
- First time visitor (56%)
- Visiting without children (43%)
- Post family (47%)

Visitors saying good are more likely to be:
- With children (54%)

Visitors saying neither/ nor are more likely to be:
- Visiting without children (15%)
- Aged 55-64 (49%)

Only two respondents gave a rating as ‘poor’. No respondents stated ‘very poor’
Visitors tend to spend money on food, drink & travel

- Does not include the cost of accommodation (which may also be inclusive of food)

<table>
<thead>
<tr>
<th>Spend</th>
<th>Mean per party</th>
<th>Mean per individual</th>
<th>% spending £0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and drink</td>
<td>£23.56</td>
<td>£9.45</td>
<td>22%</td>
</tr>
<tr>
<td>Travel in and around the area</td>
<td>£13.38</td>
<td>£5.83</td>
<td>14%</td>
</tr>
<tr>
<td>Admission charges and other spending at attractions</td>
<td>£0.92</td>
<td>£0.38</td>
<td>93%</td>
</tr>
<tr>
<td>Other leisure &amp; recreation expenditure</td>
<td>£1.09</td>
<td>£0.46</td>
<td>92%</td>
</tr>
<tr>
<td>Shopping for daily needs</td>
<td>£4.24</td>
<td>£1.65</td>
<td>77%</td>
</tr>
<tr>
<td>Shopping for gifts and souvenirs</td>
<td>£2.97</td>
<td>£1.19</td>
<td>83%</td>
</tr>
<tr>
<td>Other expenses</td>
<td>£1.94</td>
<td>£0.94</td>
<td>88%</td>
</tr>
<tr>
<td><strong>Total spend</strong></td>
<td><strong>£45.87</strong></td>
<td><strong>£18.77</strong></td>
<td></td>
</tr>
</tbody>
</table>
Visitors saw conservation of the landscape as a priority rather than any development work.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protecting the landscape from inappropriate developments</td>
<td>67%</td>
</tr>
<tr>
<td>Conserving landscape and wildlife</td>
<td>58%</td>
</tr>
<tr>
<td>Looking after footpaths, public access etc</td>
<td>57%</td>
</tr>
<tr>
<td>Conserving villages and historic remains</td>
<td>49%</td>
</tr>
<tr>
<td>Educating young people about the National Park</td>
<td>49%</td>
</tr>
<tr>
<td>Making the North York Moors an even better place to visit</td>
<td>42%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>3%</td>
</tr>
</tbody>
</table>

Q19. What are your priorities for our work over the next four year?  
Prompted. Base: 649

More likely to be visiting without children (60% / 52%)

Overall not many statistically significant differences by visitor types or previous experience.
**Better toilets and more car parking most frequently cited improvements**

<table>
<thead>
<tr>
<th>Improvement</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve the toilet facilities</td>
<td>7%</td>
</tr>
<tr>
<td>More car parking</td>
<td>7%</td>
</tr>
<tr>
<td>Cheaper car parking</td>
<td>4%</td>
</tr>
<tr>
<td>Better signage</td>
<td>3%</td>
</tr>
<tr>
<td>Better signal</td>
<td>3%</td>
</tr>
<tr>
<td>More litter bins</td>
<td>2%</td>
</tr>
<tr>
<td>More dog bins</td>
<td>2%</td>
</tr>
<tr>
<td>Clean up the area</td>
<td>2%</td>
</tr>
<tr>
<td>Better information for visitors</td>
<td>1%</td>
</tr>
<tr>
<td>More for children and young people</td>
<td>1%</td>
</tr>
<tr>
<td>Improve shopping and eating facilities</td>
<td>1%</td>
</tr>
<tr>
<td>Better traffic management</td>
<td>1%</td>
</tr>
<tr>
<td>Better maintenance of paths</td>
<td>1%</td>
</tr>
<tr>
<td>Better disabled access</td>
<td>1%</td>
</tr>
<tr>
<td>Better public transport</td>
<td>1%</td>
</tr>
<tr>
<td>More information about the walks</td>
<td>1%</td>
</tr>
<tr>
<td>Advertise the area more</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>Nothing / no suggestion</td>
<td>60%</td>
</tr>
</tbody>
</table>

Q20. What one thing could the North York Moors do to improve the experience for visitors?
Prompted. Base: 649
Conclusions
Conclusions

• The National Park attracts a large cohort of regular, repeat visitors with the levels rising again to those seen in 2004. The main audience for the National Park tends to be of white ethnicity and from Yorkshire and the Humber (Although those visiting from Yorkshire and Humber has declined since 2011).

• There appears to be potential to attract even more younger adults (aged 16-34) and ethnic minority groups given that the current proportions from these groups visiting the National Park are considerably below the national averages.

• A broad range of activities were cited with visitors often taking part in more than one activity, suggesting the wide ranging visitor offer of the park. The National Park can review the list of activities to see which activities they should look at promoting in the future.
Conclusions

• Digital technology currently has very limited usage by visitors when in the National Park, highlighting that other ways to promote the National Park’s offer to visitors during their trip is needed; especially if the desire is to expose them to the wider offer, get them to have new experiences and ultimately spend more whilst visiting.

• Previous experience is key in influencing decisions to visit the North York Moors. With this in mind the National Park should explore ways to increase the propensity of visitors to promote their experience of the National Park to others.

• With previous experience being such a strong marketing influence on visitors, it is likely to be a challenge for the National Park’s marketing team to expose visitors to new, different experiences through their communications.

• A variety of key triggers for visiting revolve around the landscape and its atmosphere (scenery, nature and wildlife, tranquillity), cultural sites, places to eat and the outdoor activity offer. All of these motivators should feature strongly in future marketing materials to continue to attract the current audience.
Conclusions

• Visitors are generally very positive about the National Park with high ratings for most experiences and all destinations where the interviews took place. Although the satisfaction ratings also show 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 National Park can review the areas which visitors are currently spending in to make decisions on which areas and ways they may want to look to increase visitor spend (e.g. the capital of cake to increase visitor spend in food and drink).

• The National Park can assess the current levels of awareness of the Special Qualities to see if there are any which they feel should be being cited or known by visitors. Could the unique qualities of the National Park be promoted more amongst visitors?

• 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. Does the Park wish to promote this status in coastal areas, to increase visitor awareness of these areas?
Management Plan Targets

• Please note that 2016 data is taken from all 7 interview locations
• Visitor awareness of special qualities taken from those who are able to name 3 or more SQ’s correctly (unprompted)

<table>
<thead>
<tr>
<th>Visitor awareness</th>
<th>2004 (Actual)</th>
<th>2011 (Actual)</th>
<th>2016 (Actual)</th>
<th>Target 2016</th>
<th>Target 2021</th>
<th>Target 2026</th>
<th>Target 2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor awareness of the NYMN</td>
<td>n/a</td>
<td>34%</td>
<td>92%</td>
<td>37%</td>
<td>40%</td>
<td>43%</td>
<td>45%</td>
</tr>
<tr>
<td>Visitor awareness of Special Qualities</td>
<td>n/a</td>
<td>18%</td>
<td>51%</td>
<td>21%</td>
<td>24%</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>Visitor awareness of being in the NP</td>
<td>83%</td>
<td>73%</td>
<td>83%</td>
<td>83%</td>
<td>85%</td>
<td>87%</td>
<td>90%</td>
</tr>
</tbody>
</table>

34% named 3 or more special qualities in 2016 for the same 3 previous interview locations used in 2011

Q15a. With regard to the North York Moors, what do you see as the quality of the North York Moors that makes it special to you? Base: 649
Q6. Do you think you are currently in? Base: 649
Appendix

Photo credits:

• Page 1 – Finest View in England at Sutton Bank / Chris J Parker
• Page 6 – Natural adventure play area at Sutton Bank / Chris J Parker
• Page 11 – Mountain biking in Dalby Forest / Joolz Diamond
• Page 25 – Hunters of Helmsley / Chris J Parker
• Page 30 – Sunny Place, Robin Hood's Bay / Tony Bartholomew
• Page 34 – Newtondale / Mike Kipling
• Page 44 – View of Staithes from the England Coast Path / Cleveland Way National Trail / Tony Bartholomew
• Page 47 – Roseberry Topping / Mike Kipling
• Page 55 – Robin Hood's Bay from Ravenscar / Mike Kipling
This research has been carried out in compliance with ISO 20252, (the International Standard for Market and Social research), The Market Research Society’s Code of Conduct and UK Data Protection law.

Contact ...

Tom Ratcliffe

tom.ratcliffe@qaresearch.co.uk

www.qaresearch.co.uk

Mill House
North Street
York ,YO1 6JD
Tel: 01904 632039