



**YORKSHIRE DALES**  
National Park Authority

2017

# Yorkshire Dales National Park Visitor Survey



*information by design*

Information by Design

01482 467467

## Yorkshire Dales National Park Authority Customer Survey 2017

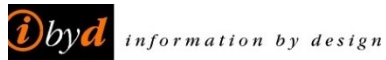
*Final Draft*

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## EXECUTIVE SUMMARY

This report contains a summary of the findings from a survey conducted on behalf of the Yorkshire Dales National Park Authority by Information by Design. The survey fieldwork was undertaken between July and October 2017 in 12 locations in total, including two in the new area of the National Park, which were Orton and Devil's Bridge. 652 interviews were completed in total and survey results are accurate to within approximately  $\pm 3.8\%$ .

Key findings from the survey include:

- Half of respondents were male and half female; the age profile is broadly comparable to the 2013 survey with 23% aged 16-44, 21% 45-54 and 27% aged 55-64 and 29% aged 65 and over.
- The social grade of respondents was determined, and showed that 75% of respondents were social grade A/B/C1 and a 25% C2/D/E. The profile of respondents by social grade is similar to 2013 but has a higher proportion from the higher social grade than nationally, where the comparable figure is 53%.
- The majority of respondents (94%) were from the UK and 6% were from outside of the UK. Ninety-five percent (95%) of respondents from the UK were from England, and over half of these (58%) were from Yorkshire and the Humber and the North West.
- 42% of respondents were day visitors and 58% were overnight visitors.
- The group respondents were in when interviewed contained a mean of 3.0 adults and 0.4 children under the age of 16. 18% of respondents were in a group that contained children.
- The majority of respondents (94%) were aware that the area they were in when interviewed was part of the Yorkshire Dales National Park.
- The majority of respondents (87%) had travelled to the Yorkshire Dales by private car or van.
- 86% of respondents had visited the Yorkshire Dales National Park before, with 57% having visited 'numerous' times in the last 12 months. 30% were visiting for the first time in the last 12 months and 14% were visiting for the first time ever.
- Google was the online source used by most respondents (42%) when planning a trip to the Yorkshire Dales. Nearly half of respondents (47%) had not used any online sources when planning their trip.
- When planning their visit, OS or other maps were the top 'off-line' source of information used by respondents. Nearly two-fifths (39%) had not used an off-line source of information when planning their visit.
- During their visit one-third (33%) had actually used, or were planning to use, Google maps as a source of information. 31% of respondents had talked to locals for information, 30% had used a National Park Visitor Centre, 27% had used brochures or leaflets from their accommodation and 24% had used websites. Nearly a quarter (23%) of respondents had not used or did not plan to use any of the sources of information asked about during their visit.
- The majority of respondents (84%) said they saw natural beauty, scenery and views as one of the special qualities of the Yorkshire Dales National Park.
- 30% of respondents had been attracted to the Yorkshire Dales on the occasion they were interviewed because they had been there before and wanted to come back

and 29% had been attracted to the Yorkshire Dales by the scenery, landscape and connecting to nature.

- 64% of respondents had visited, or were planning to visit, a café or tea room during their visit. 58% of respondents had participated in, or would participate in, general sightseeing, 57% in walking for more than one hour and 47% had visited or would visit a country pub.
- Walking for more than one hour was the main activity participated in during their visit for 43% of respondents. General sightseeing was the main activity for 20% of respondents.
- Just over three-quarters (76%) of respondents said that nothing had spoiled their enjoyment of their visit to the Yorkshire Dales. 10% of respondents said the enjoyment of their visit was spoiled by bad weather.
- 95% of respondents were very satisfied with their overall visit to the Yorkshire Dales National Park, giving it a score of 5 or 6 out of 6. No respondents were 'not at all satisfied' with their visit (i.e. no one gave a score of 1 or 2).
- Over three-quarters of respondents (77%) had used a car park during their visit to the Yorkshire Dales. 72% had used a café, pub or restaurant, 69% had used toilets and 56% had used rights of way.
- There were high levels of satisfaction with most of the facilities and services respondents had used during their visit to the Yorkshire Dales. Over 80% of respondents were very satisfied (a score of 5 or 6 out of 6) with all facilities and services asked about, apart from wi-fi and mobile phone coverage. Only half of respondents were very satisfied (a score of 5 or 6) with wi-fi and mobile coverage while nearly a quarter (24%) were not at all satisfied (a score of 1 or 2).
- 77% of respondents were very likely to return to the area in the next two years (a score of 9 or 10 out of 10). Only 4% of respondents were not at all likely to return to the area in the next two years (a score of 0 or 1).
- 91% of respondents were very likely to recommend the area to friends and family (a score of 9 or 10 out of 10). Only 1% of respondents were not at all likely to recommend the area (a score of 0 or 1). The net promoter score, a measure of customer recommendation, was very high 88%, in comparison with several national brands.

This report includes differences between the 2013 and 2017 surveys. As a whole, the profile of visitors surveyed is broadly similar in 2017 as in 2013. Visitors continue to be from the more affluent social grades, suggesting that there is an under-representation of those from social grades C2/D/E. There is a suggestion that the profile of staying visitors appears to have changed, with a higher proportion staying overnight outside of the National Park, and a higher proportion staying one or two nights rather than for longer breaks. However, there is a small increase in new visitors to the National Park, who are more likely to be staying visitors rather than day visitors. Further analysis of these segments of visitors could support marketing and other interventions. There are also some important pointers on the use of online and offline sources, with the use of offline sources diminishing as online information becomes the main source of information. In addition, recommendation and word of mouth are clearly important factors influencing the decision to visit.

There are a number of differences in visitor characteristics by social grade, and in particular, strong differences in the activities undertaken as part of a visit to the National Park. Those from lower social grades are less likely to have taken part in a walk of an hour or more.

Visitors are generally highly satisfied with their visit and satisfaction has continued to increase over the years. In addition, satisfaction with particular facilities has continued to rise, the most notable being the increase in satisfaction with the National Park Centres. This suggests that the work of the YDNPA is crucial to ensuring that the area continues to be a successful visitor destination with high levels of visitor satisfaction. This is reflected in the extremely high Net Promoter Score, a measure of how likely respondents are to recommend, which exceeds major household name brands such as Apple.

**Information by Design  
March 2017  
Final Draft**

## 1 BACKGROUND AND METHODOLOGY

### BACKGROUND

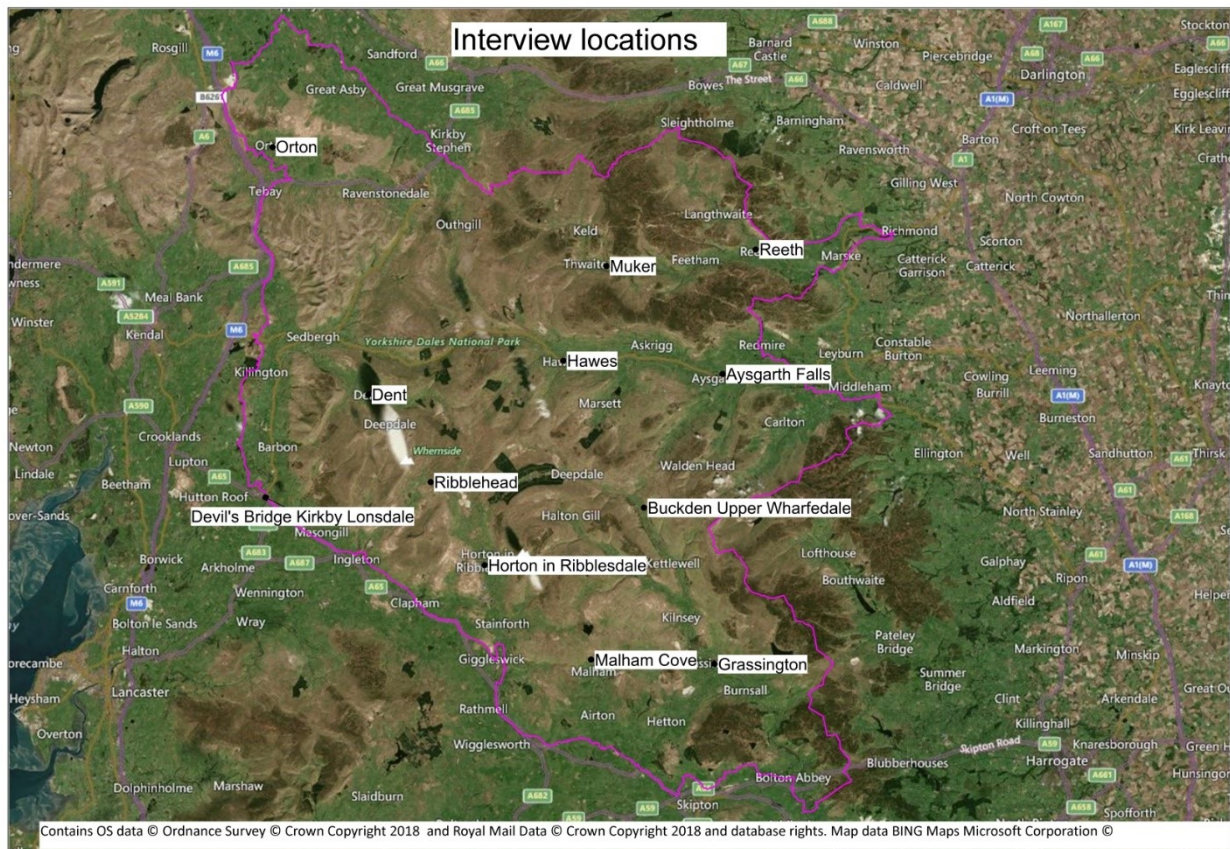
- 1.1 This report gives the results from the survey conducted with visitors to the Yorkshire Dales National Park (YDNP). The survey was commissioned by Yorkshire Dales Park Authority (YDNPA) and conducted by Information by Design.
- 1.2 The main objectives of the Customer Survey were to:
- Provide information from existing customers visiting the Yorkshire Dales National Park area on their views of various aspects of the National Park and services provided for customers.
  - Compare the findings from the 2017 survey with those from the earlier survey conducted in 2013, and, where possible, to earlier customer surveys.
  - Examine survey responses from the new locations included in the survey due to the expansion in the YDNP area.
- 1.3 There has been a significant development to the YDNP area since the previous survey in 2013. The National Park was extended in August 2016 to include new areas in the Lune Valley, northern Howgills and Westmorland Dales. This increased the National Park area by 24%.

### METHODOLOGY

- 1.4 Face-to-face interviews were conducted with visitors to the Yorkshire Dales National Park at 12 locations (see map on following page):
- Aysgarth Falls
  - Buckden
  - Dent
  - Devil's Bridge near Kirkby Lonsdale
  - Grassington
  - Hawes
  - Horton in Ribblesdale
  - Malham Cove
  - Muker
  - Orton
  - Reeth
  - Ribbleshead

The new locations (from 2013) within the extended National Park area were Orton and Devil's Bridge.

A copy of the survey questionnaire can be found in Appendix 3.



- 1.5 The fieldwork was conducted from July to October 2017, with interviews conducted before the school summer holiday period (pre), during the school summer holiday period (peak) and after the school summer holiday period (post). Both weekdays and weekend days were covered.
- 1.6 In total, 652 interviews were completed. The table below shows the number of interviews completed by location and time period. It should be noted that respondents were able to choose not to answer questions, and so the base size (the number of respondents answering each question) for some of the questions is slightly smaller than 652.

Number of interviews by location and time period				
	Pre	Peak	Post	Total
Aysgarth Falls	18	36	38	92
Buckden	0	17	17	34
Dent	0	22	21	43
Devil's Bridge	13	12	10	35
Grassington	35	51	37	123
Hawes	38	36	41	115
Horton in Ribblesdale	11	0	11	22
Malham Cove	31	32	19	82
Muker	12	12	0	24
Orton	13	13	10	36
Reeth	11	11	0	22
Ribblehead	12	12	0	24
<b>Total</b>	<b>194</b>	<b>254</b>	<b>204</b>	<b>652</b>



- 1.7 The survey population was defined as all visitors to the National Park. This included those who live locally (within the National Park area) who were visiting the location of the interview but excluded anyone on a regular shopping trip, visiting for work or business and spending less than 3 hours in the location. Potential respondents to the survey were selected at random, with the next person being selected for interview as soon as the previous interview was completed.
  
- 1.8 The achieved sample size of 652 respondents means that the overall results to the survey are accurate to within approximately  $\pm 3.8\%$ . This means that for a survey result of 50% for example, we can be reasonably sure (95% confident) that the true value (of the population of all visitors) lies within 46.2% and 53.8%.

## 2 SURVEY RESULTS

2.1 This section details the results from the survey with visitors to the Yorkshire Dales National Park.

### DEMOGRAPHICS

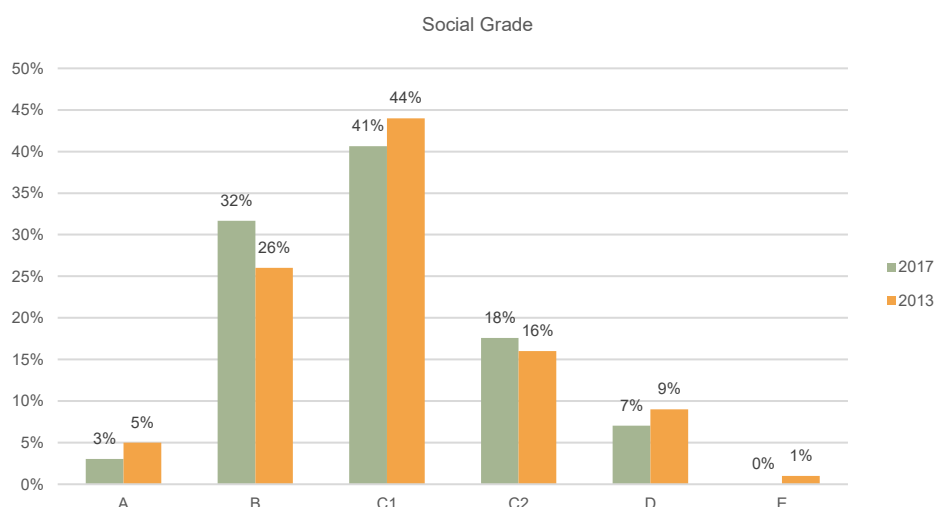
2.2 Half of respondents (50%) were male and half were female.

2.3 Nearly a quarter (23%) of respondents were aged between 16 and 44 years, 21% were aged 45-54, 27% were aged 55-64 and 29% were aged 65 and over. This age profile is broadly comparable to the 2013 survey where 58% of respondents were aged 55+ (56% in 2017).

2.4 Respondents were asked the occupation of the main wage earner in the household. This information was later coded against standard occupational classifications (SOC) to provide the social grade of the respondent. Social grades are defined as:

Social Grade	Description
A	Upper Middle Class: Higher Managerial, Administrative or Professional
B	Middle Class: Intermediate Managerial, Administrative or Professional
C1	Lower Middle Class: Supervisory or Clerical, Junior managerial, Administrative or Professional
C2	Skilled Working Class: Skilled Manual Workers
D	Working Class: Semi and Unskilled Manual Workers
E	Those at lowest level of subsistence: State Pensioners or Widows (no other earner), Casual or Lowest Grade Workers

2.5 Three quarters (75%) of respondents were social grade A/B/C1 and a quarter were C2/D/E. The profile of respondents by social grade is similar to 2013. In this 2017 survey, a slightly higher proportion of visitors were from social grades D and E, but the proportion from the lower social grades (C2, D and E) are around a quarter in both surveys. Nationally, 53% of the population are in the social grade A/B/C1, 47% are C2/D/E<sup>1</sup>.



<sup>1</sup> 2011 Census. See table QS613EW – Social Grade for England and Wales.

2.6 The table below shows the social grade of respondents compared to the North West and Yorkshire and Humber regions and to England and Wales. A higher proportion of respondents to the survey were social grade AB and C1 than in the North West and Yorkshire and Humber regions. The proportion of survey respondents that were C2 and DE was lower than in the North West and Yorkshire and Humber regions.

Social Grade					
	2017	2013	North West	Yorkshire and the Humber	England and Wales
AB	35%	31%	20%	19%	23%
C1	41%	44%	30%	29%	30%
C2	18%	16%	22%	23%	22%
DE	7%	10%	28%	29%	25%

2.7 The majority of respondents (91%) were White British. 7% were from other white ethnic groups, 2% from mixed ethnic groups and 1% were from Asian ethnic groups.

2.8 The question on ethnicity was updated in this 2017 survey to use the question from the 2011 census. This allows those from 'Other White' ethnic groups to be recorded separately (in the 2013 questionnaire, White/British/Irish/Other White background was one category). Key results from this are:

- In 2013, 99% were recorded in the 'White' ethnic groups category, compared to 98% in 2017<sup>2</sup>.
- In 2017, 7% of visitors were from the 'White Other' group. This includes those from Europe, including Eastern Europe.

2.9 The table below shows the ethnic group of respondents compared to the North West and Yorkshire and Humber regions and England and Wales. A higher proportion of survey respondents were from white ethnic groups and a lower proportion were from Asian ethnic groups than in the North West and Yorkshire and Humber regions.

Ethnic group				
	2017	North West	Yorkshire and the Humber	England and Wales
White: British	91%	87%	86%	80%
White: Other	7%	3%	3%	5%
Mixed	2%	2%	2%	2%
Asian	1%	6%	7%	8%
Black	0%	1%	2%	3%
Other	0%	1%	1%	1%

2.10 Just over one in ten (12%) of respondents were in a party where a member of the party had a long-term health issue or disability that limits their daily activities. This is similar to the figure recorded in 2013.

<sup>2</sup> The 2013 figure here takes account of those who said 'prefer not to say'.

## ORIGIN OF VISITORS

2.11 The majority of respondents (94%) were from the UK and 6% were from outside of the UK. In 2008 and 2013, 2% and 7% respectively were from outside of the UK.

2.12 Ninety-five percent (95%) of respondents from the UK were from England, 3% were from Scotland, 1% were from Wales and less than 1% were from Northern Ireland and the Channel Islands. Over half (58%) were from Yorkshire and the Humber and the North-West.

Region			
	2017 (Count)	2017 (%)	2013 (%)
Yorkshire and The Humber	229	37%	34%
North West	129	21%	17%
North East	46	8%	9%
East of England	41	7%	9%
South East	39	6%	6%
East Midlands	38	6%	6%
South West	22	4%	5%
West Midlands	22	4%	5%
Scotland	20	3%	4%
London	16	3%	3%
Wales	7	1%	1%
Northern Ireland	2	0%	0%
Channel Island	1	0%	0%
Total	612	100%	100%

2.13 The table below shows the region of the UK for respondents interviewed at the two new sites used in this research, Orton and Devil's Bridge, compared to the other ten sites. Respondents interviewed at the two new sites were more likely to be from the North West, with 54% of respondents interviewed at Orton or Devil's Bridge from North West compared to 17% of respondents interviewed at the other ten sites.

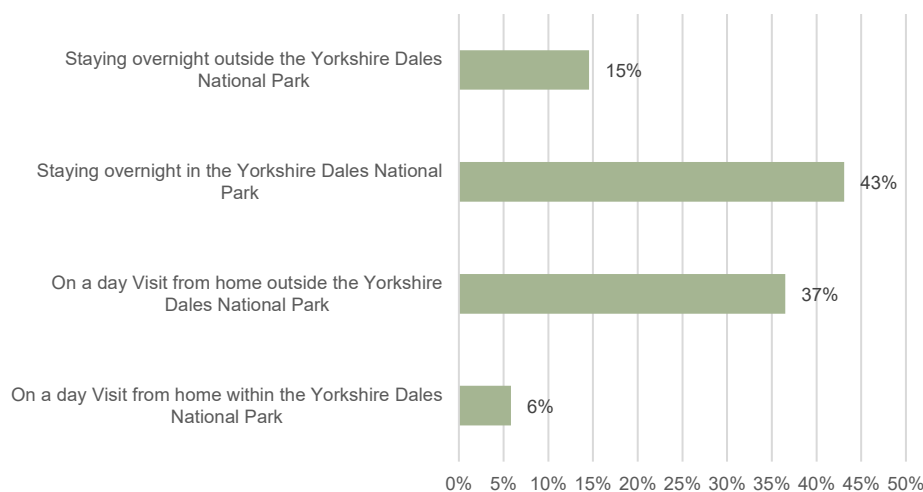
Region				
	Sites used in previous research		New sites used in 2017 research (Orton & Devil's Bridge)	
	Count	%	Count	%
Yorkshire and the Humber	222	41%	7	11%
North West	94	17%	35	54%
North East	38	7%	8	12%
East of England	40	7%	1	2%
South East	37	7%	2	3%
East Midlands	34	6%	4	6%
South West	20	4%	2	3%
West Midlands	20	4%	2	3%
Scotland	18	3%	2	3%
London	14	3%	2	3%
Wales	7	1%	0	0%
Northern Ireland	2	0%	0	0%
Channel Island	1	0%	0	0%
Total	547	100%	65	100%

- 2.14 A map showing the home location of respondents, based on postcodes, is contained in Appendix 2.
- 2.15 In the 2013 survey, 34% of visitors were from the Yorkshire and Humberside region, and 17% were from the North-West. The proportion from the North West is the same in 2017 when the two new sites used in 2017 (Orton and Devil's Bridge) are excluded, with 17% from this region. The proportion from the Yorkshire and Humberside region is higher in 2017 than in 2013 when the two new sites are excluded, with 41% were from this region in 2017, compared to the 34% in 2013.

## VISITOR TYPE

- 2.16 Forty-three percent (43%) of respondents were day visitors to the Yorkshire Dales National Park, with 6% living within the Yorkshire Dales National Park (11 respondents) and 37% having come from outside the Yorkshire Dales National Park. 58% of respondents were overnight visitors, with 43% staying overnight in the Yorkshire Dales National Park and 15% staying overnight outside of the park.

Which of the following best describes your visit today?

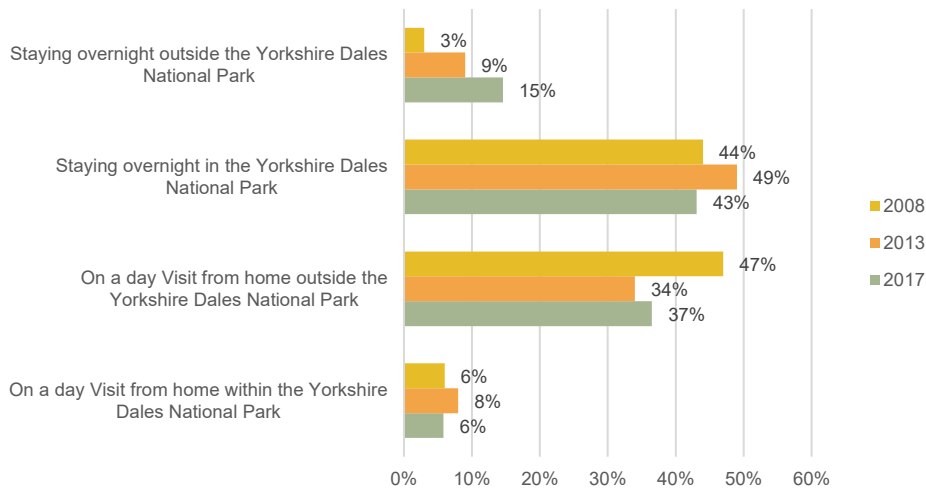


Base: 652

- 2.17 There were some differences in the profile of day and overnight staying visitors by social grade. Amongst visitors who were from the C2/D/E social grade, 47% were day visitors, whereas for those who were from the A/B/C1 social grade, 41% were day visitors. This difference is further emphasised by the home location of respondents. Visitors who were from social grade C2/D/E were more likely to be from the Yorkshire and Humber region, with 44% of visitors who were C2/D/E from the Yorkshire and the Humber region, whereas for those from the A/B/C1 social grade only 33% were from this region.
- 2.18 The profile of visitors is again broadly comparable to earlier surveys (see chart below). Key points from comparisons over time are:
- In 2017, 43% of visitors were 'day visitors'. This compares with 42% in 2013 and 53% in 2008. The proportion of day visitors is lower than the 2008 survey, but shows no change between 2013 and 2017.

- For 'staying visitors', the proportion of visitors in 2017 was 58%. This is the same as in the 2013 survey. However, there has been a change in the make-up of staying visitors over the three surveys. In 2017, 15% of visitors were staying outside the YDNP; 43% were staying in the YDNP. In 2013 and 2008, smaller proportions of visitors were staying outside the YDNP – 9% and 3% respectively. It is important to note that this shows the proportion of staying and day visitors has changed, and does not relate to the overall visitor numbers.

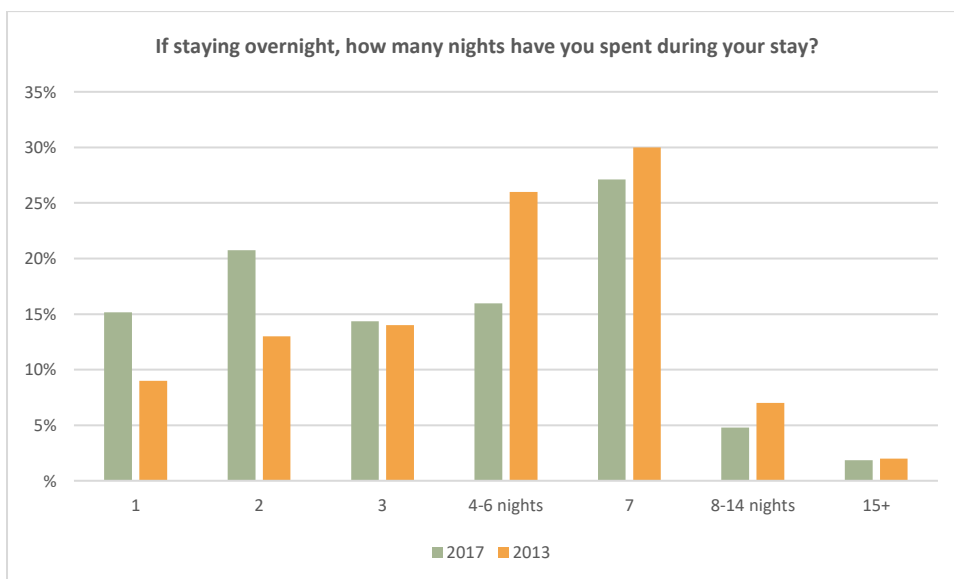
Which of the following best describes your visit today?



Base: 652

## DURATION OF STAY

- 2.19 Visitors who were staying overnight (either in the YDNP or outside) were asked how many nights they were staying. In this 2017 survey, 15% were staying for one night, 21% for two nights and 27% for a week. The chart below shows the lengths of stay for both the 2017 and 2013 surveys. In this latest survey, a greater proportion of visitors interviewed were staying for short breaks of one or two nights (compared to the 2013 survey).



Base: 652

- 2.20 The table below compares the average number of nights stayed by overnight visitors. The mean number of nights stayed is lower in 2017 than in 2013 (4.49 nights and 5.45 nights respectively) but is still higher than 2008.

Average length of stay	Mean	Mode (top three)
2017	4.49 nights	7 nights (27% gave this answer)
		2 nights (21%)
		3 nights (15%)
2013	5.45 nights	7 nights (30%)
		2 nights (14%)
		3 nights (14%)
2008	4.18 nights	2 nights (32%)
		7 nights (22%)
		3 nights (12%)

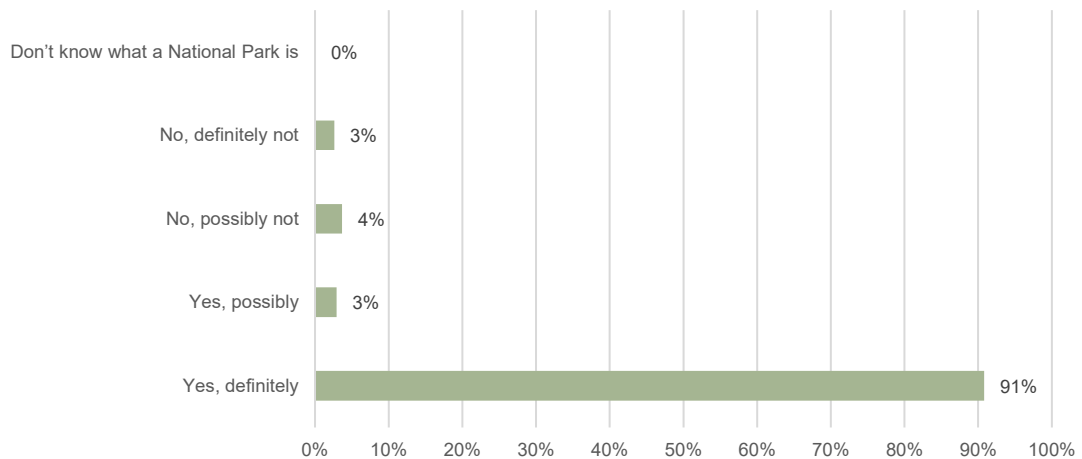
## GROUP COMPOSITION

- 2.21 The mean number of adults in the group respondents were with when interviewed was 3.0, with the number ranging from 1 to 42. There is a cluster of high outliers with 15 or more adults. Excluding the 13 cases with 15 or more adults the mean is 2.5 adults.
- 2.22 The mean number of children aged under 16 in the group was 0.4, with the number ranging from 0 to 30. 18% of respondents were in a group that contained children. There is a cluster of high outliers with 14 or more children. Excluding the 3 cases with 14 or more children the mean is 0.3 children. These results are similar to those in the 2013 survey when the average group size was 2.81 adults and 0.25 children.

## AWARENESS OF THE YORKSHIRE DALES NATIONAL PARK

- 2.23 Respondents were asked if they were aware that the area they were in was a part of the Yorkshire Dales National Park. The majority of respondents (94%) were aware that the area they were in, when interviewed, was part of the Yorkshire Dales National Park, with 91% 'definitely' aware and 3% 'possibly' aware. Only 6% of respondents were not aware that the area was part of the Yorkshire Dales National Park, with 2.6% 'definitely' not aware and 3.7% 'possibly' not aware. All respondents knew what a National Park was. Respondents interviewed in Orton and Devil's Bridge were less likely to be aware that the area they were in was part of the Yorkshire Dales National Park, with 79% aware that the area they were in was part of the Yorkshire Dales National Park compared to 96% for the other ten sites. Overall, respondents who were (definitely or possibly) not aware that the area they were in was part of the YDNP were more likely to be from social grades C2, D and E (10% of this group, compared to 5% of those in social grades A, B and C1). (See chart overleaf)

Were you aware that this area was a part of the Yorkshire Dales National Park?

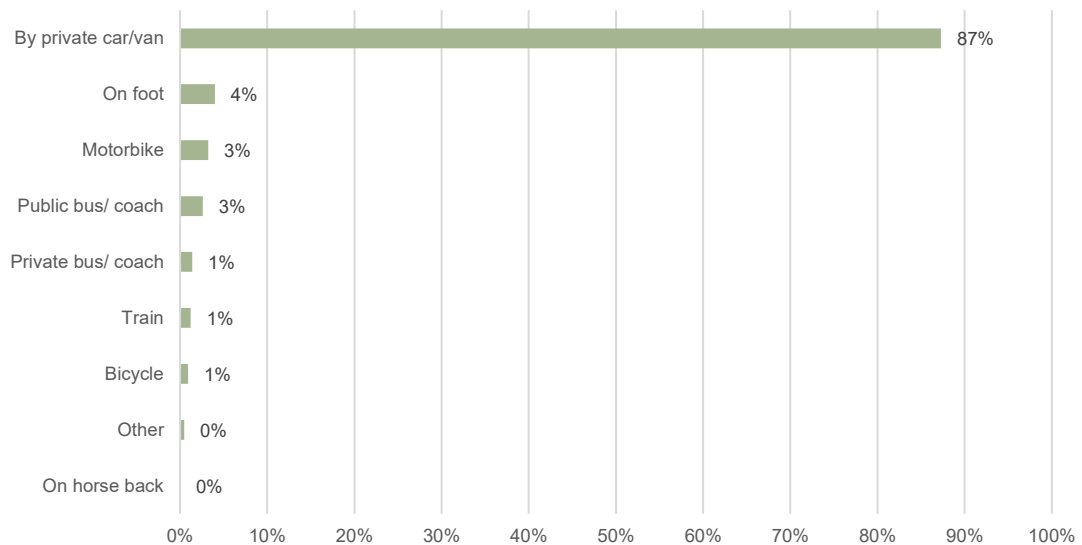


Base: 652

TRAVEL TO THE YORKSHIRE DALES NATIONAL PARK

2.24 The majority of respondents (87%) had travelled to the location they were interviewed in by private car or van. 4% had travelled on foot, 3% by motorbike, 3% by public bus or coach, 1% by private bus or coach, 1% by train, 1% by bicycle and less that 1% by another method.

How did you travel here today?



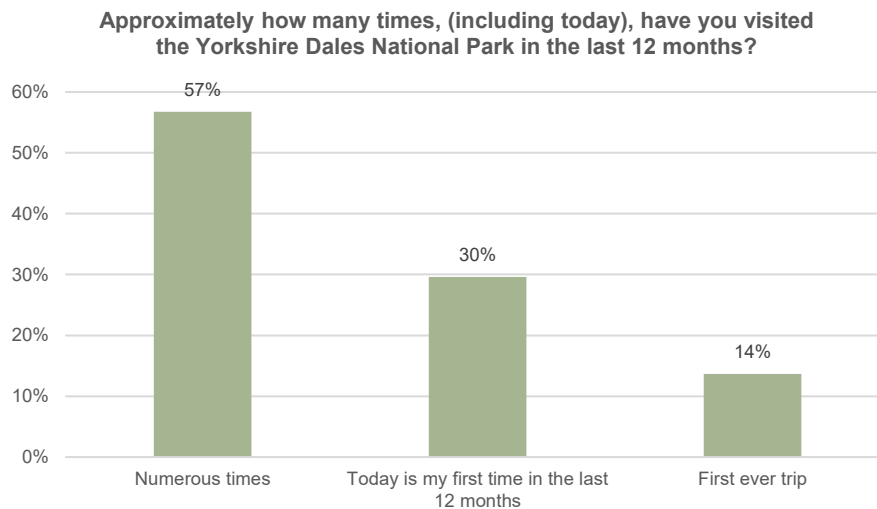
Base: 652

2.25 The results are similar to the 2013 survey. In 2013, 89% travelled to the location they were interviewed in that day by private car/van (87% in 2017), 3% travelled by public bus/coach (3% in 2017) and 2% by private bus/coach (1% in 2017).



## REPEAT AND FIRST TIME VISITORS

2.26 Eighty-six percent (86%) of respondents had visited the Yorkshire Dales National Park before, with 57% having visited ‘numerous’ times in the last 12 months and 30% visiting for the first time in the last 12 months. 14% of respondents were visiting the Yorkshire Dales National Park for the first time ever.



Base: 652

2.27 Although this question has changed since the 2013 survey, there are still some comparisons over time that can be made. This year, 86% of respondents said they had visited the YDNP in the last 12 months. This is an increase from 70% in 2013 and 64% in 2008.

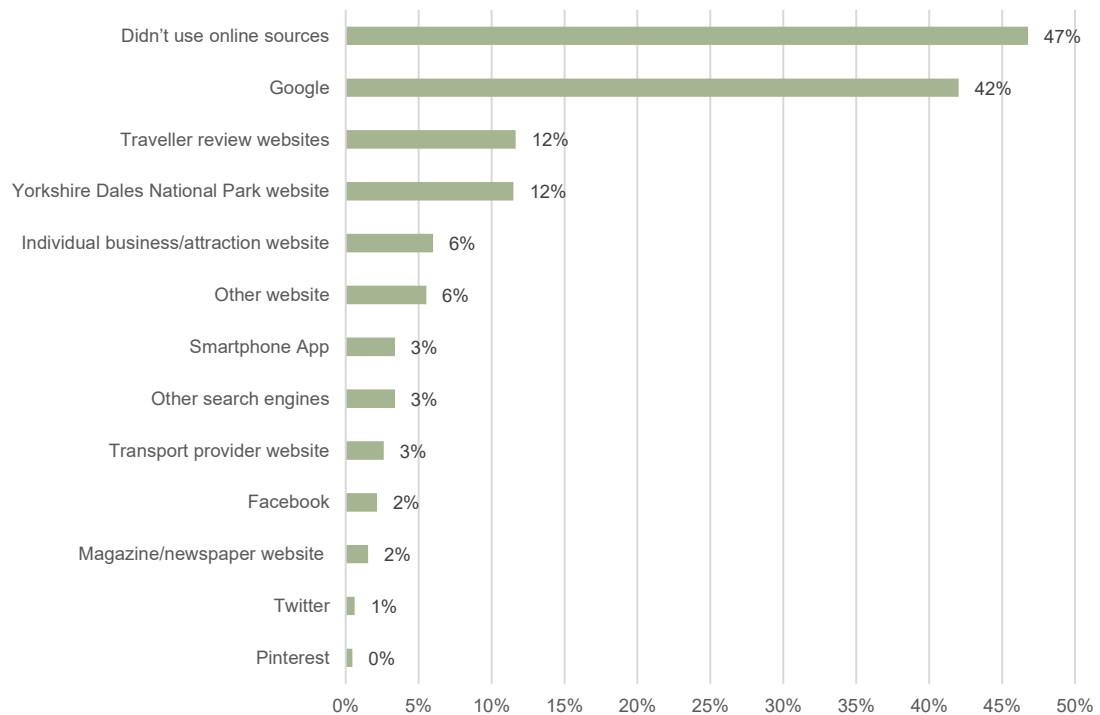
2.28 Additionally, in 2017, 14% of respondents said that this was their first ever trip to the YDNP. This compares with 10% in 2013 and 7% in 2008.

2.29 There is a significant difference in the pattern of visits between day visitors and those staying overnight in the YDNP. Staying visitors were more likely to be visiting for the first time in the last 12 months (42% staying visitors compared to 20% of day visitors). Day visitors were more likely to have visited the YDNP numerous times in the last 12 months (69% of day visitors compared to 41% of staying visitors). Staying visitors were also more likely to be on their first ever trip to the YDNP than day visitors (17% of staying visitors compared to 11% of day visitors).

## SOURCE OF INFORMATION USED WHEN PLANNING TRIP

2.30 The online sources used by most respondents when planning a trip to the Yorkshire Dales was Google, which was used by 42% of respondents. 12% of respondents had used a traveller review website and 12% had used the Yorkshire Dales National Park website. Nearly half of respondents (47%) had not used any online sources when planning their trip. Only a very small proportion used social media (Facebook, Twitter) as sources of information.

Which of the following online sources did you use when planning your trip to the Yorkshire Dales?



Base: 652

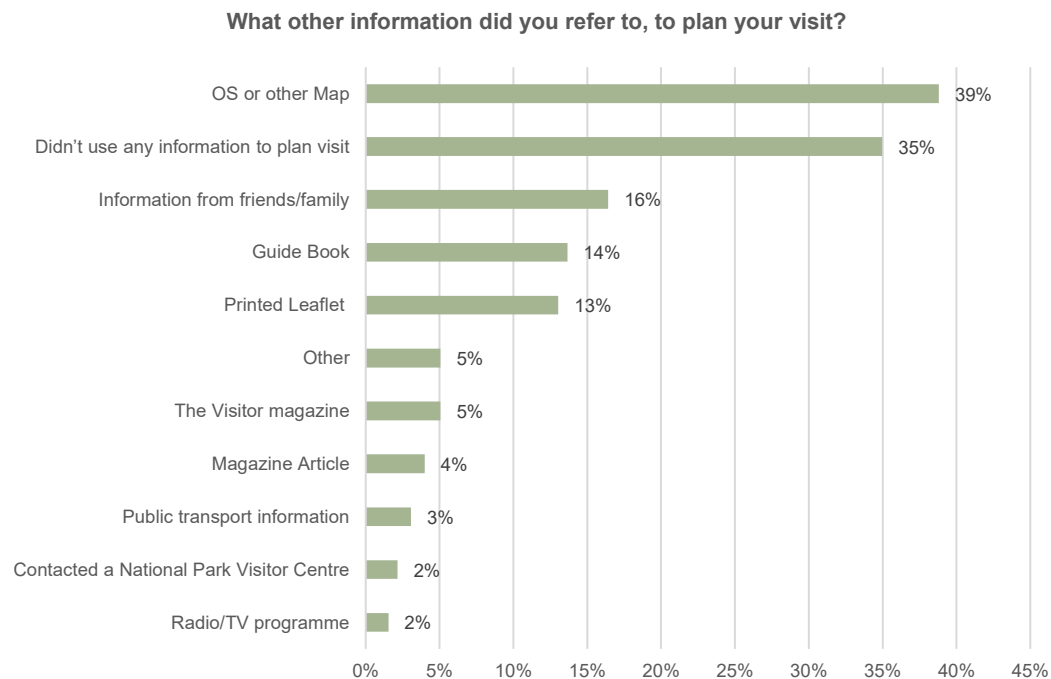
2.31 There are some comparisons which can be made to earlier surveys. The question in this 2017 survey was re-designed to split both online and offline sources of information (in previous surveys they were combined), and to bring the potential information sources up-to-date. Key comparisons of online sources used are:

- In 2017, 12% of respondents had used the YDNP website when planning their trip. This is an increase from 8% in 2013, and in 2008 (the same figure).
- In 2017, only 6% used an 'other' website; in 2013 the figure was 19%, in 2008 it was 15%. This could be a reflection of the large proportion (42%) of respondents now using Google as a source of information.

2.32 There are some differences in the online information sources used by different groups when planning a trip to the YDNP. For example, 14% of visitors who were staying overnight in the YDNP used the YDNP website when planning their visit, compared with 9% of day visitors. This is a small difference (and not statistically significant). There are, however, bigger differences between day visitors and those staying overnight in the YDNP for the following online information sources as shown in the table below.

Online sources used	Day visitors	Staying visitor
Traveller review website	7%	18%
Individual business/attraction website	4%	8%
Google	33%	54%

2.33 OS or other maps were the ‘off-line’ source of information referred to by most respondents when planning their visit, with 39% of respondents using this source of information. 16% of respondents had used information from friends and family, 14% had used a guide book and 13% had used printed leaflets when planning their visit. Nearly two-fifths (39%) had not used any off-line source of information when planning their visit.



Base: 652

2.34 Similarly, comparisons between the 2017 results and earlier surveys for offline sources are:

- OS and other maps was again the main offline source used by visitors in planning their visit. In 2017, 39% used this as a source, compared to 26% in 2013 and 52% in 2008.
- Information from family and friends was used as a source by a higher proportion of visitors in 2017 – 16% used this source in 2017, 9% in 2013 and 8% in 2008.
- A guide book and printed leaflets were used by 14% and 13% respectively in 2017. In 2013, the comparable figures were also 14% and 13% (both reductions from the 2008 survey – 22% for each source).

2.35 Again, there are significant differences between day and staying visitors in the offline information sources used. Those staying overnight in the YDNP were more likely to have used the following sources in planning their trip:

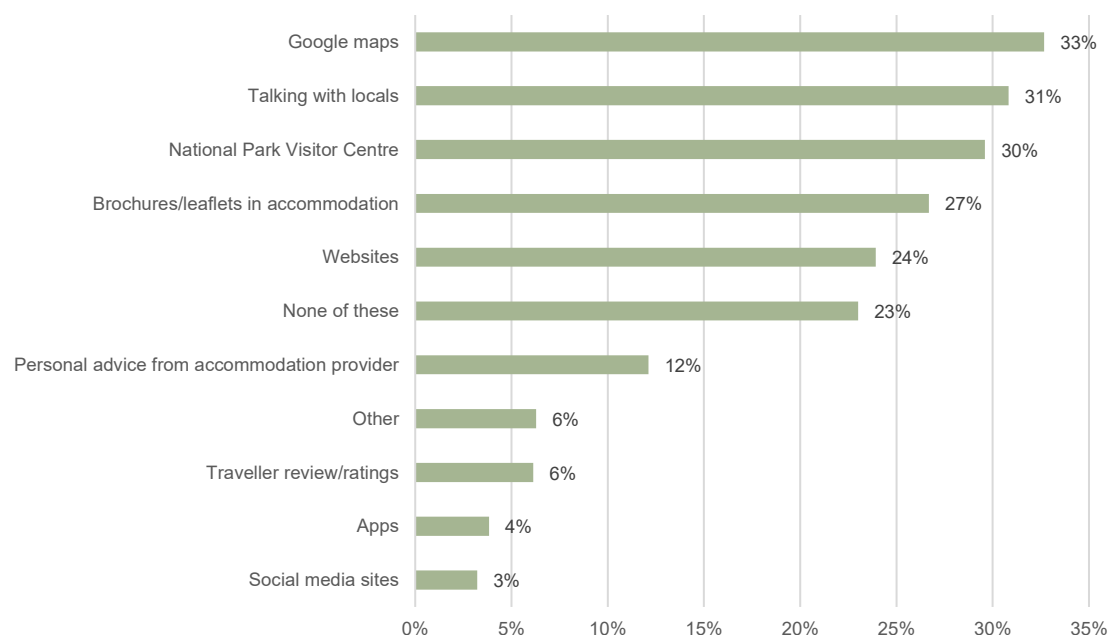
Offline sources used	Day visitor	Staying visitor
OS or other map	35%	43%
Printed leaflet	8%	20%
Magazine article	2%	7%
The Visitor Magazine	3%	8%
Information from friends/family	14%	20%

2.36 There are also significant differences in the offline information sources used to plan the visit by social grade. Visitors from the C2/D/E grades were less likely to use OS or other maps (42% of A/B/C1 compared to 30% of C2/D/E) and less likely to use a guide book (16% of A/B/C1 and 8% of C2/D/E).

## SOURCES OF INFORMATION USED DURING TRIP

2.37 One-third of respondents (33%) had used, or were planning to use, Google maps as a source of information during their visit. 31% of respondents had talked to locals, 30% had used a National Park Visitor Centre, 27% had used brochures or leaflets from their accommodation and 24% had used websites. Nearly a quarter (23%) of respondents had not used and did not plan to use any of the sources of information listed during their visit. This is likely to be because they are repeat visitors with knowledge of the area already. Respondents who had visited the YDNP 'numerous times' in the last 12 months were less likely to have used, or planned to use, any of the sources of information, with 33% of those who had visited the YDNP 'numerous times' in the last 12 months, 12% of those who had visited YDNP previously but this was their first visit in the last 12 months, and 7% of those on their first ever trip to YDNP not having used, or planned to use, any of the sources of information.

During your visit which of the following sources of information have you or will you use to look for things to see and do?



Base: 652

- 2.38 There were significant differences in the information sources used during their visit between day visitors and those staying in the YDNP overnight. Staying visitors were more likely to have used the following as sources of information during their trip.

Information sources during trip	Day visitors	Staying visitors
Talking with locals	24%	40%
Websites	17%	33%
National Park Visitor Centre	22%	40%
Personal advice from accommodation providers	7%	19%
Brochures/leaflets in accommodation	16%	41%

- 2.39 There was also a significant difference in information sources used during the visit by social grade. Those from social grade C2/D/E were more likely to use social media as a source during their visit.

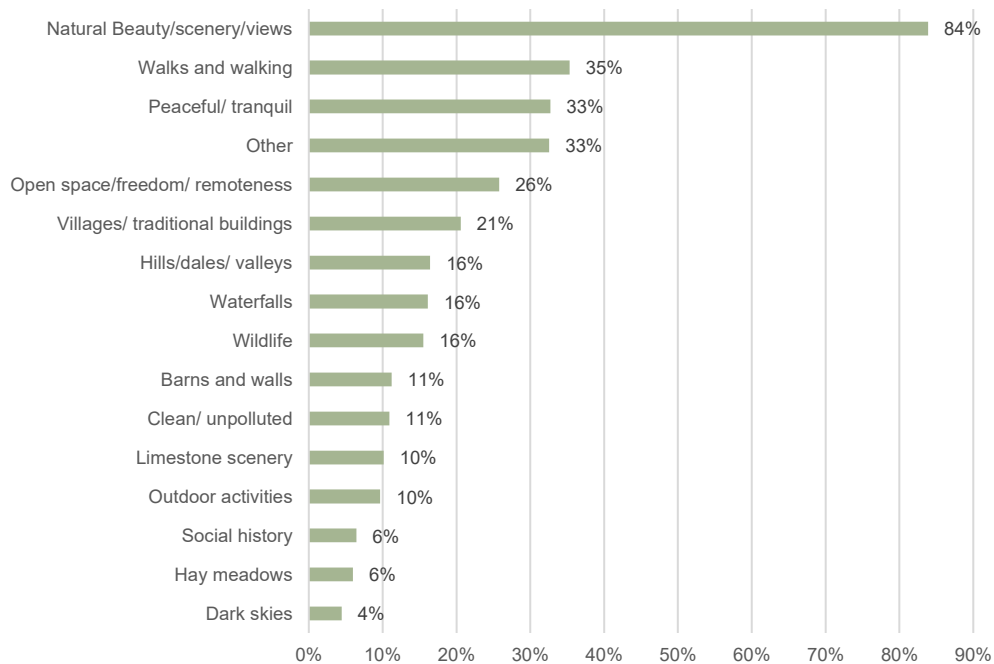
- 2.40 There were significant differences in the information sources used during their visit between those who had visited the YDNP 'numerous times' in the last 12 months, 12%, those who had visited YDNP previously but this was their first visit in the last 12 months, and those on their first ever trip to YDNP.

Information sources during trip	Numerous times	Today is my first time in the last 12 months	First ever trip
Talking with locals	26%	32%	47%
Google maps	30%	32%	46%
Websites	20%	25%	39%
National Park Visitor Centre	22%	41%	36%
Personal advice from accommodation provider	7%	18%	22%
Brochures/leaflets in accommodation	16%	40%	43%
Traveller review/ratings	4%	5%	17%

## YORKSHIRE DALES NATIONAL PARK SPECIAL QUALITIES

2.41 When asked what they see as the special qualities of the Yorkshire Dales National Park, the majority of respondents (84%) said one of its special qualities was natural beauty, scenery and views. 35% of respondents thought one of the special qualities of the Yorkshire Dales was walks and walking and 33% thought one of the special qualities of the Yorkshire Dales was peace and tranquillity.

With regards to the Yorkshire Dales National Park, what do you see as its special qualities?



Base: 651

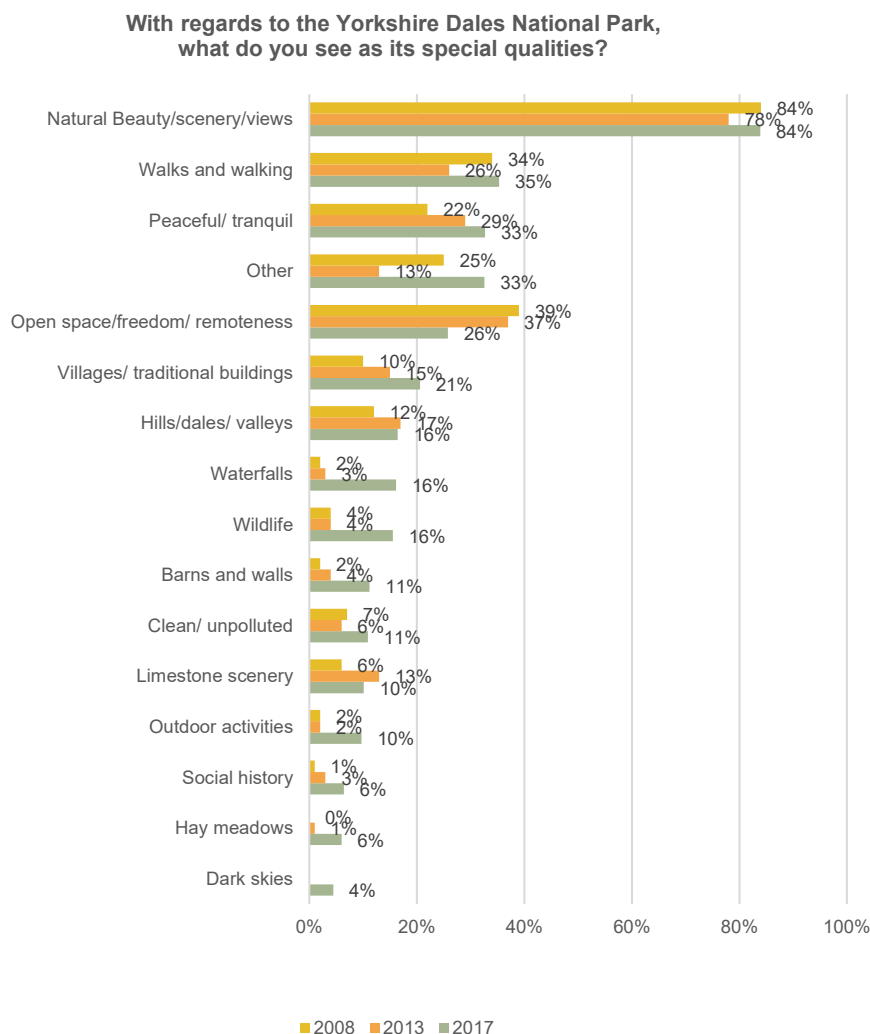
2.42 Staying visitors were more likely to think that each of the 15 aspects listed in the questionnaire were special qualities of the YDNP. Three of the aspects considered as special qualities of the YDNP were less likely to be mentioned by day visitors than staying visitors (and were significantly different statistically). These were villages/traditional buildings, waterfalls and peaceful/tranquil.

Aspect considered a special quality of the YDNP	Day visitors	Staying visitors
Villages/traditional buildings	18%	24%
Waterfalls	13%	20%
Peaceful/tranquil	28%	40%

2.43 The question asked in the 2017 survey was the same as in the previous surveys in 2008 and 2013, with the minor change of including an option of 'dark skies' to the 2017 survey questionnaire.

2.44 Looking at the results over time shows that natural beauty/scenery/views was seen as the main special quality of the YDNP in each of the 3 surveys. This year, 84% gave this as its special quality, compared with 78% in 2013 and 94% in 2008. The results do show some important changes over time for other aspects, including:

- Peaceful/tranquil – a third (33%) saw this as a special quality in 2017, up from 29% in 2013 and 22% in 2008. This increase is partly balanced by a slight reduction in those who responded that a special quality of the park was open space/freedom/remoteness.
- Villages/traditional buildings – the proportion who thought this is a special quality of YDNP increased from 10% in 2008 to 15% in 2013, and to 21% in 2017.
- Waterfalls, wildlife, barns and walls – for each of these aspects the proportion thinking they are a special quality has increased – a statistically significant increase since 2008 and 2013. (See chart below)

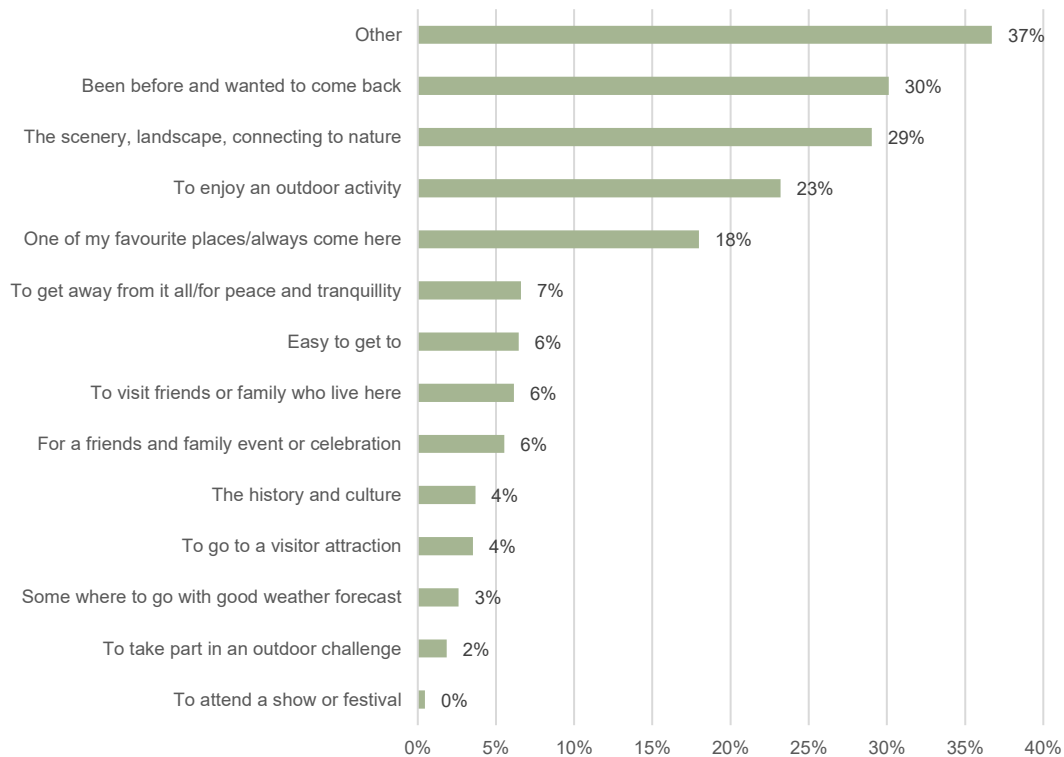


Base: 2017 = 651, 2013 = 502, 2008 = 554

2.45 As shown in the chart below, when asked what had attracted them to the Yorkshire Dales on the occasion they were interviewed, 30% of respondents

had been there before and wanted to come back and 29% had been attracted to the Yorkshire Dales by the scenery, landscape and connecting to nature. 23% had come to the Yorkshire Dales to enjoy an outdoor activity and 18% had come because 'it's one of their favourite places' or they 'always come here'. 37% of respondents had been attracted to the Yorkshire Dales by something else.

Thinking broadly about your decision to visit the Yorkshire Dales, what was it that attracted you to visit here on this occasion?



Base: 652

2.46 There were significant differences in what attracted visitors to the YDNP between day and staying visitors. Those staying overnight in the YDNP were more likely to have come for the scenery/landscape/connecting to nature, because it is one of their favourite places, and to get away from it all.

Aspect that attracted respondents to the YD on this occasion	Day Visitors	Staying Visitors
Scenery/landscape/connecting to nature	26%	34%
One of my favourite places/always come here	13%	25%
Somewhere to go with good weather forecast	4%	1%
To get away from it all/for peace and tranquillity	4%	10%

2.47 A large proportion of respondents to the survey gave 'other' as a response to this question – 37% in total. As illustrated in the word-cloud diagram below (which shows the most commonly used words in the 'other' responses) there was a wide range of responses in terms of 'other' aspects. Some came to 'walk' or to 'shop' or to 'visit their caravan' in the area – all of which are highlighted as larger words in the word-cloud. Others visited for specific events or attractions, including 'three peaks' 'cheese shop' 'steam train, 'Pen-y-Ghent' and a range of named pubs. Another cluster of responses are connected to celebration type





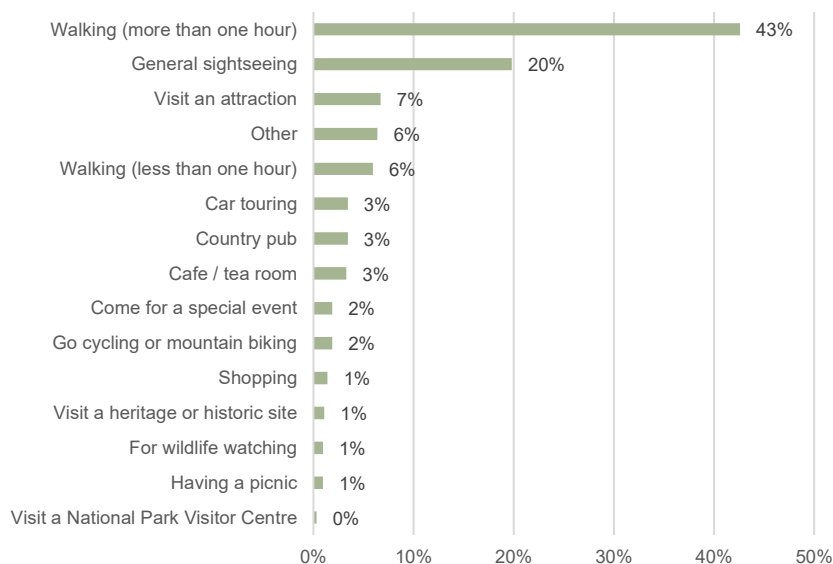
2.49 Unsurprisingly, due to their longer stay, those staying overnight in the YDNP were significantly more likely to have taken part in a range of activities during their visit, compared to day visitors. These are shown in the table below.

Activities have or will participate in during visit	Day visitors	Staying visitors
Walking (more than one hour)	53%	62%
General sightseeing	51%	67%
Country pub	40%	57%
Shopping	19%	32%
Car touring	18%	31%
Visit a national park centre	20%	36%
Visit a heritage or historic site	11%	17%

2.50 There are also differences in the activities undertaken during the visit by social grade. Those in social grade A/B/C1 were more likely to have taken part in a walk of one hour or more (59% of A/B/C1, 49% of C2/D/E). Those in social grade C2/D/E were more likely to have taken part in 'general sightseeing' (56% of A/B/C1, 64% of C2/D/E) and car touring (21% of A/B/C1, 29% of C2/D/E).

2.51 When asked what was the main activity they had participated in, or would participate in, during their visit, 43% of respondents stated that their main activity would be walking for more than one hour. General sightseeing was the main activity for 20% of respondents. Only 7% said that visiting an attraction was the main activity of their visit.

What is, or will be, your main activity today?



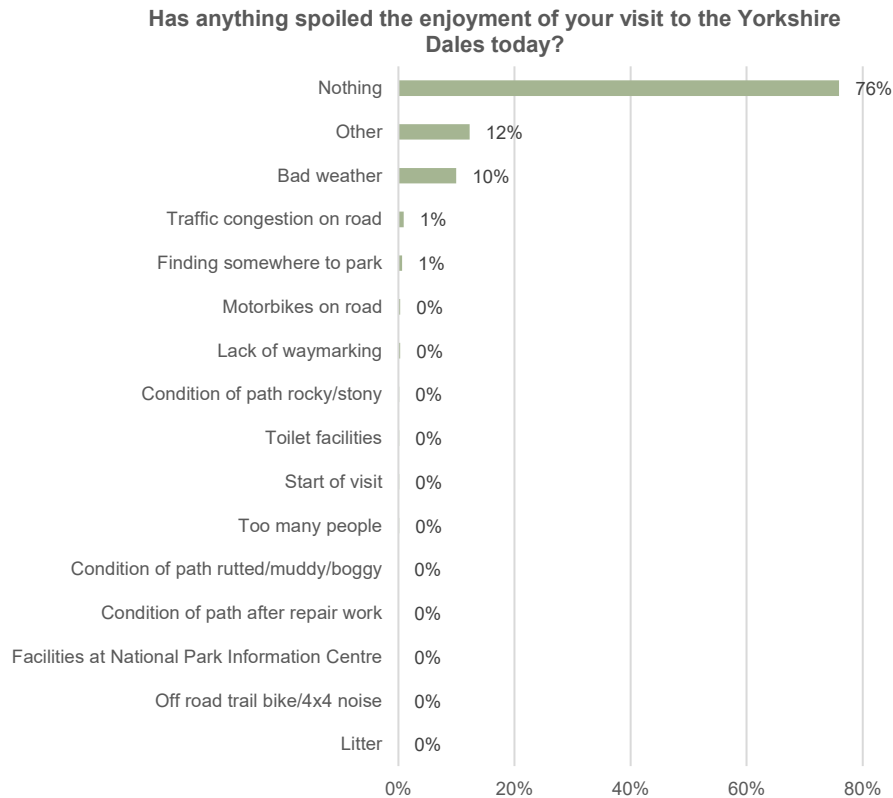
Base: 641

2.52 Walking was the main activity of the visit for 45% of A/B/C1 visitors and 31% of C2/D/E visitors. General sightseeing was the main activity of the visit for 17% of A/B/C1 visitors and 31% of C2/D/E visitors.

2.53 Both questions above (what activities have or will be undertaken and what or will be the main activity) were new questions in the 2017 questionnaire and so there are no comparable results for previous years.

## BARRIERS TO ENJOYMENT

2.54 When asked if anything had spoiled the enjoyment of their visit to the Yorkshire Dales, just over three-quarters (76%) of respondents said that nothing had spoiled their enjoyment. One-in-ten (10%) respondents said the enjoyment of their visit was spoiled by bad weather and 12% said that something else had spoiled the enjoyment of their visit.



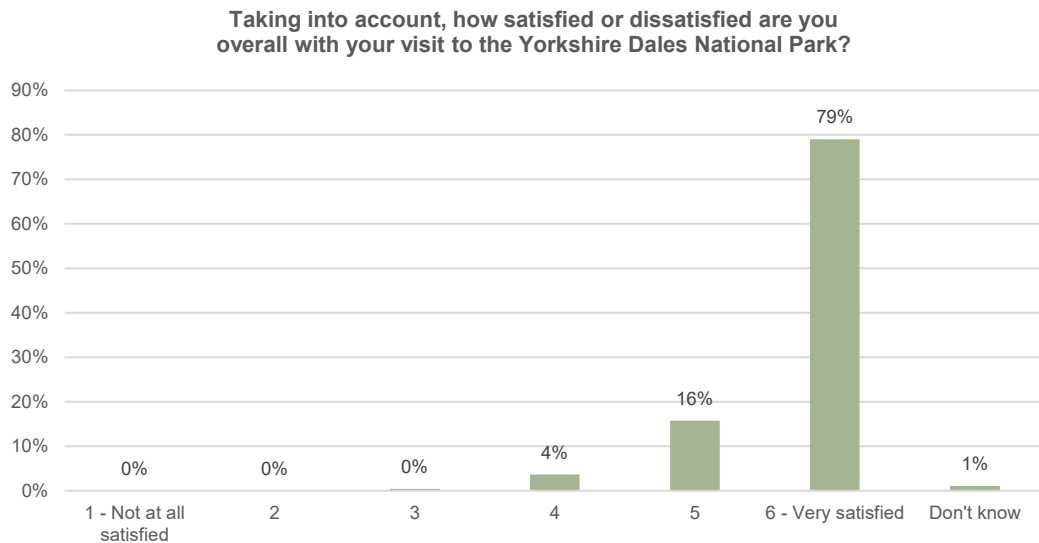
Base: 652

2.55 Whilst there were some changes in the responses given to the question on aspects that may have spoilt the visit this year, the results to this 2017 survey are broadly comparable with those from the 2013 survey. Key comparisons are shown in the table below.

Negative aspect	2017	2013	2008
Nothing	76%	75%	59%
Bad weather	10%	9%	16%
Traffic congestion on road	1%	4%	5%
Finding somewhere to park	1%	0%	1%

SATISFACTION WITH OVERALL VISIT

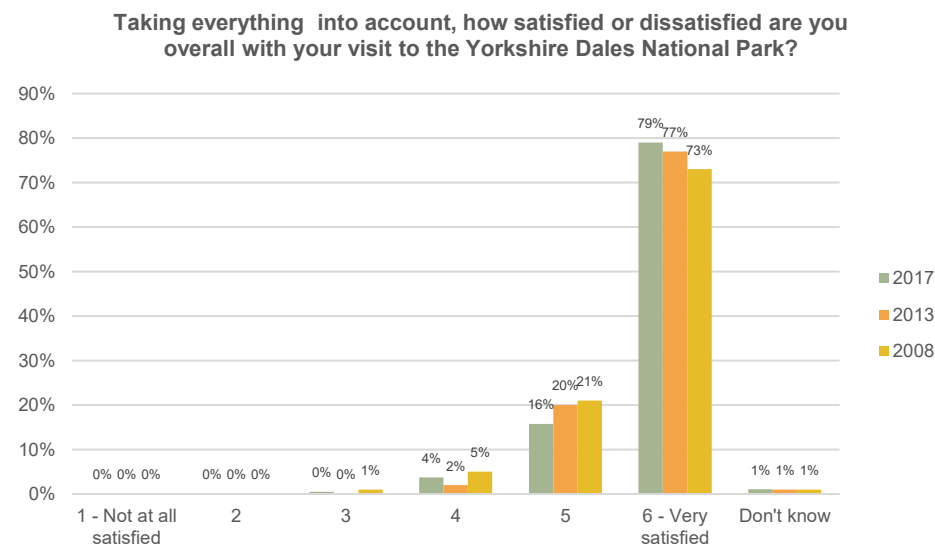
2.56 The majority of respondents were very satisfied with their overall visit to the Yorkshire Dales National Park, with 79% of respondents giving a score of 6 out of 6. No respondents were 'not at all satisfied' with their visit (a score of 1 or 2).



Base: 648

2.57 There were no significant differences in overall satisfaction with the visit to the YDNP between day and staying visitors. 79% of day visitors were very satisfied, compared with 80% of those staying overnight.

2.58 The results show a continued increase in the proportion of visitors who were very satisfied with their visit to the YDNP over time. The comparable figures for the proportion who were very satisfied with their visit in 2013, 2008 and 2002 were 77%, 73% and 51% respectively.

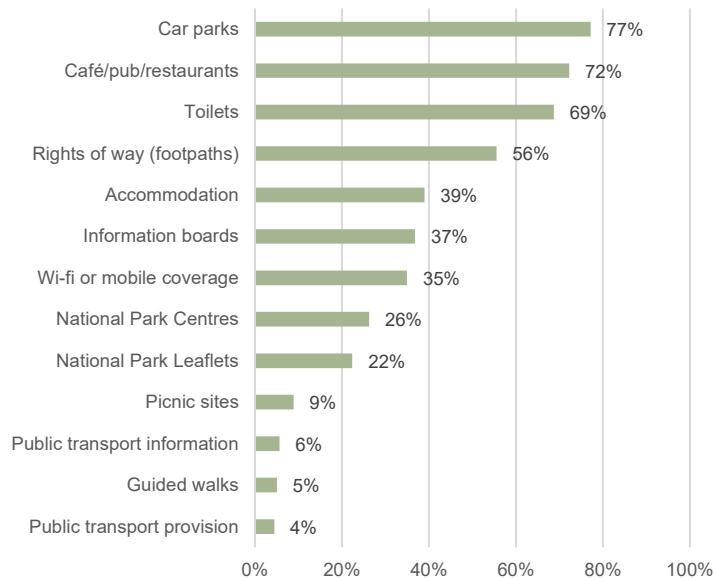


Base: 2017 = 648, 2013 = 502, 2008 = 553

## USAGE AND SATISFACTION WITH FACILITIES

2.59 Over three-quarters of respondents (77%) had used a car park during their visit to the Yorkshire Dales. 72% of respondents had used a café, pub or restaurant, 69% had used public toilets and 56% had used rights of way.

During your visit to the Yorkshire Dales have you used any of the following facilities or services?



Base: 652

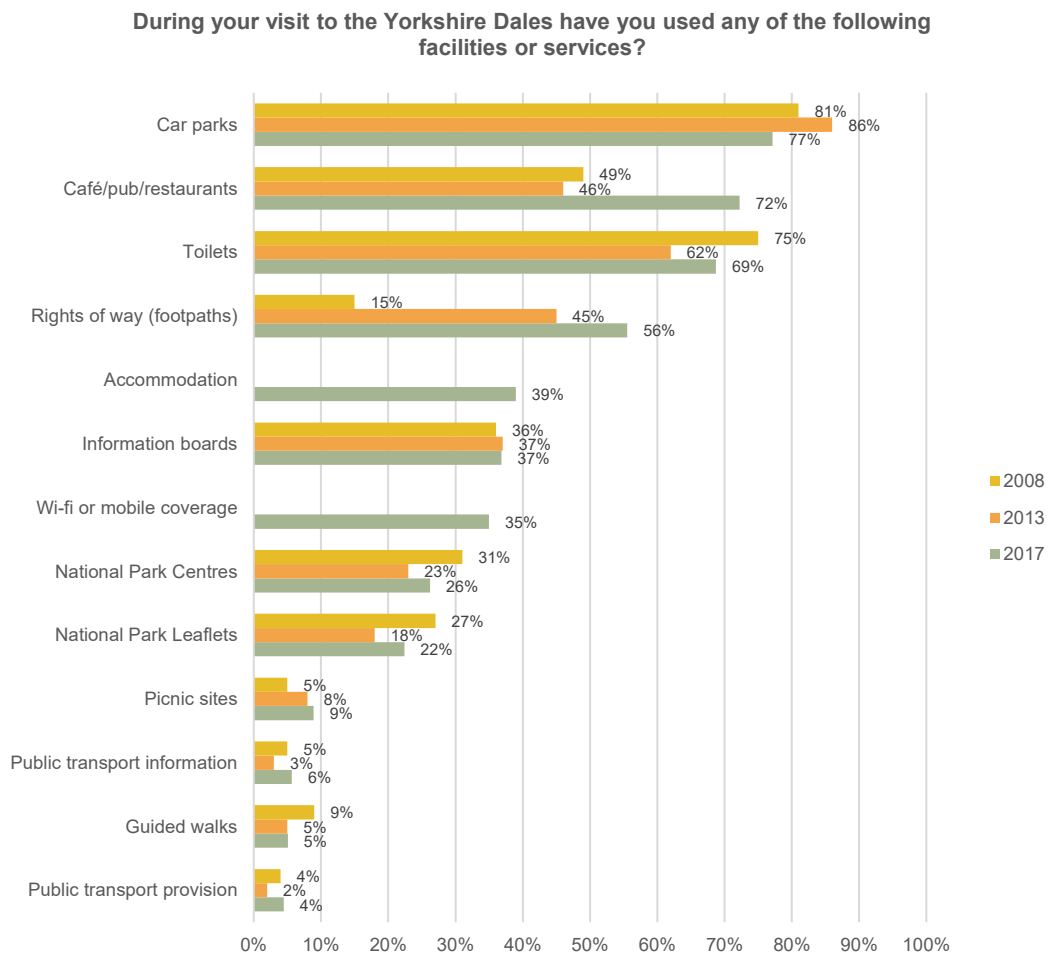
2.60 Again unsurprisingly there were some significant differences in the facilities and services used during the visit to the YDNP between day and overnight visitors. Those staying in the area overnight were more likely to have used a range of facilities/services.

Facilities and Services used	Day Visitors	Staying visitors
Toilets	65%	73%
Rights of way	49%	64%
Café/pub/restaurant	66%	80%
Information boards	30%	45%
National Park leaflets	15%	33%
Guided walks	4%	7%
National Park Centres	16%	40%
Picnic sites	6%	12%
Wi-fi or mobile coverage	23%	51%
Accommodation	14%	72%

2.61 There are some changes over time in the usage of different facilities – see chart below. These include:

- The proportion of visitors using car parks has declined slightly on previous years – 77% in 2017, compared to 86% in 2013 and 81% in 2008 (a similar proportion had travelled to the area by private car or van in all three years – 87% in 2017, 89% in 2013 and 90% in 2008).
- The proportion of visitors using cafes, pubs or restaurants has increased from previous surveys – from 46% in 2013 and 49% in 2008, to 72% in 2017.
- The proportion of visitors using rights of way/footpaths has also increased since the previous surveys – from 15% in 2008, to 45% in 2013 and now to 56% in 2017.
- The proportion using National Parks Centres has remained fairly constant over the 3 surveys and remains at approximately a quarter (26%) of visitors. This is also the case for National Park leaflets.

2.62 Two new categories were introduced in this 2017 survey. Thirty-nine percent had used accommodation during their visit, and over a third (35%) had used wi-fi or mobile coverage.

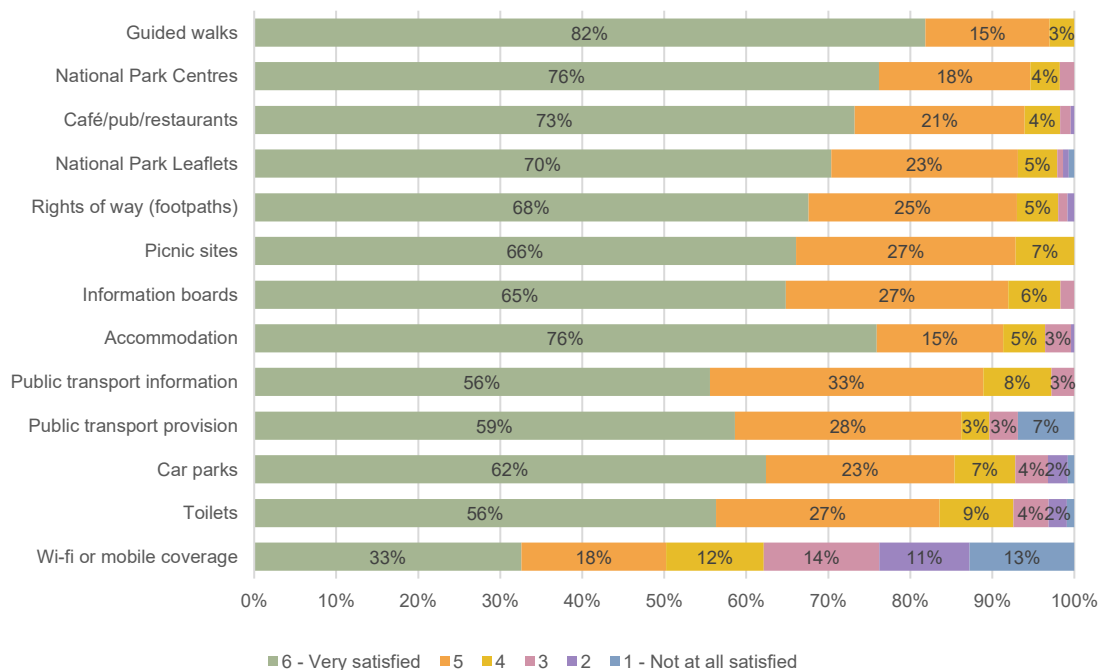


Base: 2017 = 652, 2013 = 502, 2008 = varying

2.63 There were high levels of satisfaction with most of the facilities and services respondents had used during their visit to the Yorkshire Dales:

- Over 90% of respondents who had used the facility or service were very satisfied (a score of 5 or 6 out of 6) with guided walks, National Park Centres, café/pub/restaurants, National Park leaflets, rights of way (footpaths), picnic sites, information boards and accommodation.
- Over 80% of respondents were very satisfied (a score of 5 or 6) with public transport information, public transport provision, car parks and toilets.
- Satisfaction with wi-fi or mobile coverage was lower. 51% of respondents were very satisfied (a score of 5 or 6) with wi-fi and mobile coverage while nearly a quarter (24%) were not at all satisfied (a score of 1 or 2). (See chart below).

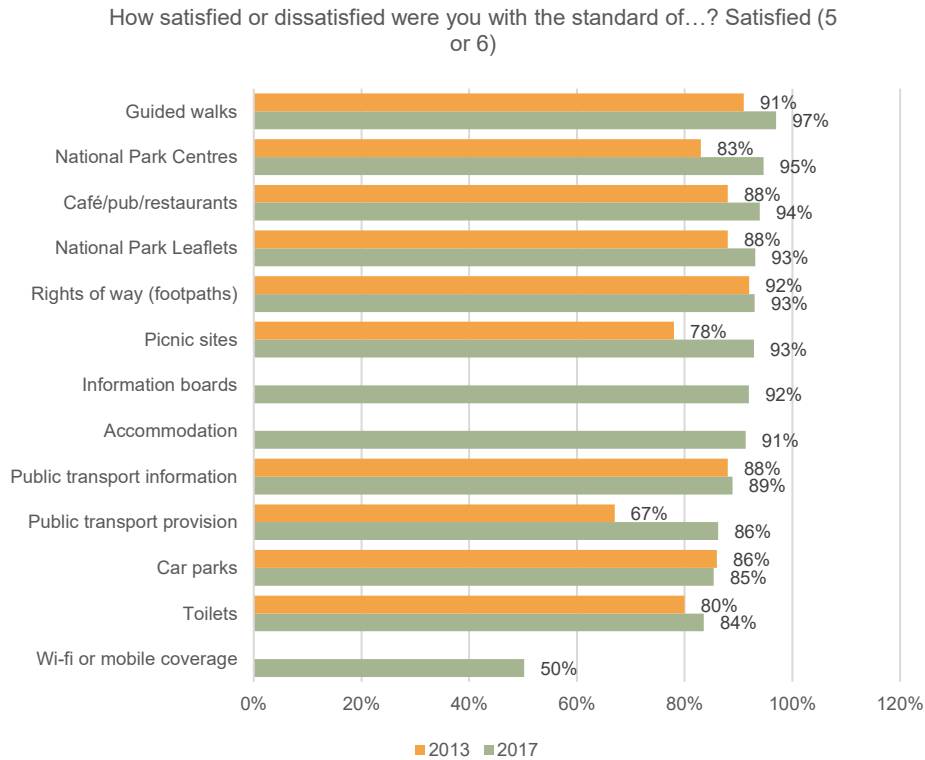
How satisfied or dissatisfied were you with the standard of...?



Base: 29 – 500 (Small base size for guided walks (33), public transport information (36) and public transport provision (29))

2.64 Levels of satisfaction with the various facilities and services were compared for day and staying visitors. There was only one aspect where there was a significant difference. Those staying overnight were slightly more satisfied with toilets than day visitors (85% of staying visitors gave satisfaction with toilets a score of 5 or 6, compared with 82% of day visitors).

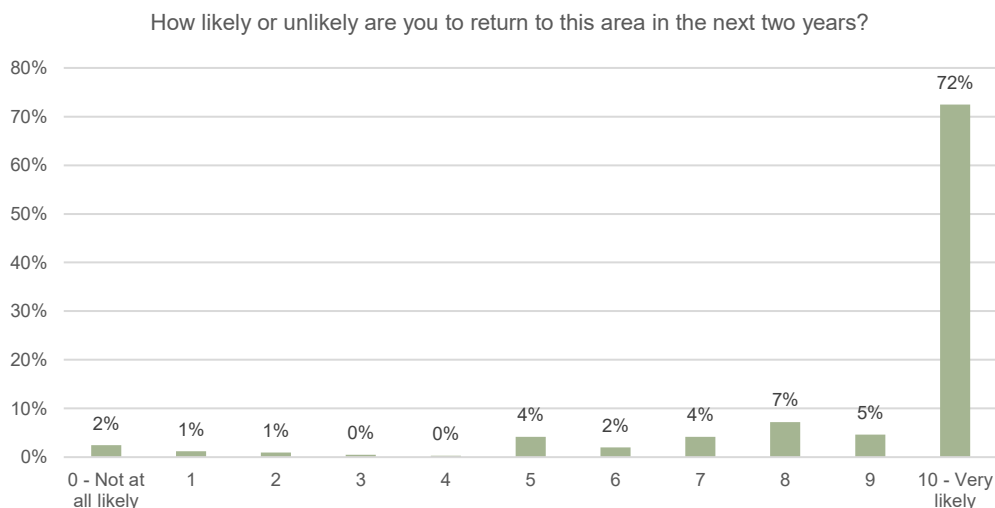
2.65 For many of the facilities or services with the highest levels of satisfaction, there has been an increase in satisfaction since the 2013 survey. For example, the proportion who were satisfied with National Park Centres increased from 83% in 2013 to 95% in this 2017 survey (168 sample size). Similarly, guided walks (small sample size), cafes/pubs/restaurants, national park leaflets, picnic sites (small sample size) and public transport provision (small sample size) also saw large increases in satisfaction between 2013 and 2017. Comparison of the results from 2013 and 2017 are shown in the chart below.



Base: 2017 = 29 – 500, 2013 = varying

### LIKELIHOOD TO RETURN AND RECOMMENDATION

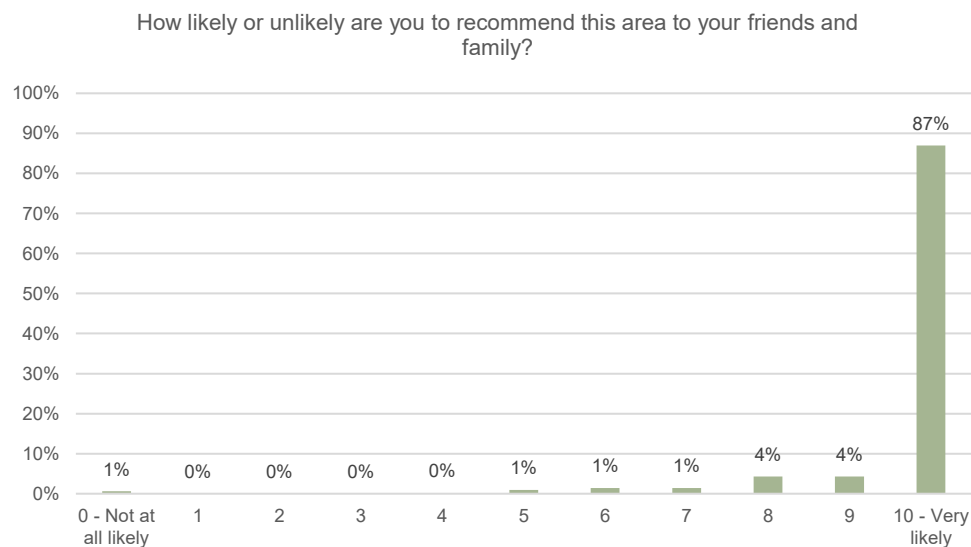
2.66 Over three-quarters (77%) of respondents were very likely to return to the area in the next two years (a score of 9 or 10 out of 10). Only 3% of respondents were not at all likely to return to the area in the next two years (a score of 0 or 1).



Base: 650



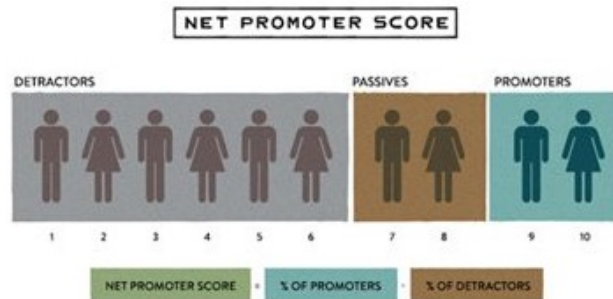
- 2.67 Comparison of the results on likelihood to return to the YDNP area in the next 2 years by social grade shows some differences. 76% of A/B/C1 gave a score of 9 or 10 out of 10 on likelihood to return, compared with 83% of C2/D/E visitors.
- 2.68 The question on likelihood to return to the area was updated from the 2013 survey. The 2013 question used a 5-point scale (nationally recognised scale of 0-10 used in 2017) and also asked about likelihood of visiting the area in the next 5 years (2 years used in 2017). However, some comparisons can be made. In 2017, 77% of visitors said that they are very likely to return to the area in the next 2 years – in 2013, 82% said they were likely to return in the next 5 years.
- 2.69 The majority of respondents (91%) were very likely to recommend the area to friends and family (a score of 9 or 10 out of 10). Only 1% of respondents were not at all likely to recommend the area (a score of 0 or 1).



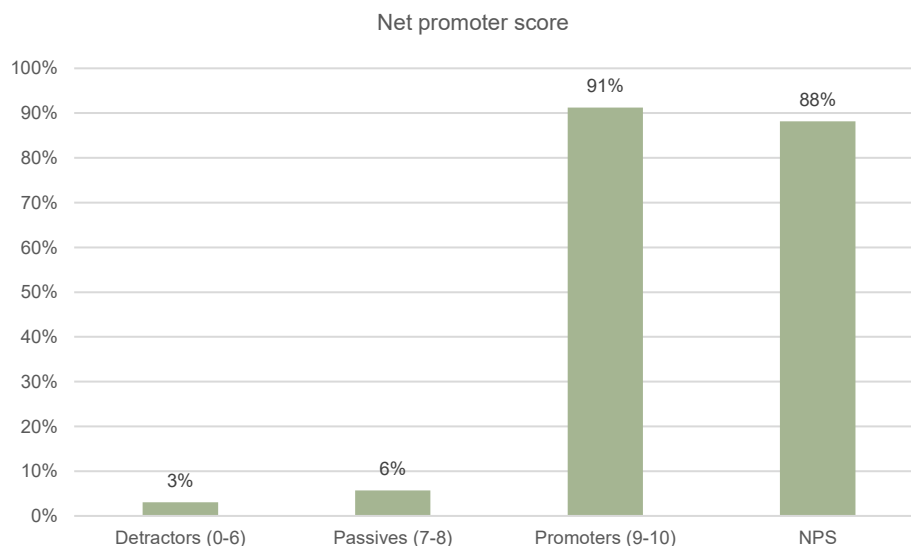
Base: 651

- 2.70 C2/D/E visitors were also slightly more likely to recommend the area to friends and family. 91% of A/B/C1 gave a score of 9 or 10 out of 10, 93% of C2/D/E. This was a new question in the 2017 survey and there are therefore no comparisons to earlier surveys.
- 2.71 There are no significant differences in likelihood to recommend the area between day and staying visitors. 87% of both day visitors and those staying overnight gave a likelihood to recommend score of 10 out of 10.

2.72 Likelihood to recommend the Yorkshire Dales National Park area can be used to calculate a “net promoter score” (NPS). The Net Promoter Score is a measure which is used by a number of major organizations to understand their customer loyalty. NPS is calculated by subtracting the percentage of respondents who gave a score of 0-6 (detractors) from the percentage of respondents who gave a score of 9 or 10 (promoters). Respondents who gave a score of 7 or 8 are classed as ‘passives’ and are not included in the calculation.



2.73 As shown in the chart below, 91% of respondents were promoters (gave a score of 9-10) and 3% were detractors (gave a score of 9 or 10) giving the Yorkshire Dales National Park an NPS of 88%.



Base: 651

2.74 The NPS for YDNP is very high and higher than that of many major brands – for example, Apple has an NPS of 66% and Dell has an NPS of 55%. Major food chains have an NPS ranging from -8 (Macdonalds) to 78 (Pizza Hut) It is much higher than Easyjet, which is -16. Collection of NPS scores from other National Park areas would be helpful to interpret this figure.

**easyJet**  
Type: B2C  
Size: Large



	<b>McDonald's</b> Type: B2C Size: L	-8
	<b>Pizza Hut</b> Type: B2C Size: L	78
	<b>Starbucks</b> Type: B2C Size: Large	77
	<b>KFC</b> Type: B2C Size: L	53

## DIFFERENCES BETWEEN OLD AND NEW SITES

2.75 The table below summarises the differences between the sites used in previous research and used again in this research, and the two new sites, Orton and Devil's Bridge, included in 2017 for the first time. For each question it shows the category, the result for the sites used in the previous research, the results for the new sites and then the difference between the two. It can be seen that there are some very large differences, for example in the first question, there was a 23% difference between those who were staying overnight between the 'old' sites used in the previous research and the new sites.

Question	Category	Sites used in previous research	New sites used in 2017 research (Orton & Devil's Bridge)	Difference
Which of the following best describes your visit today?	Staying overnight (in or outside of the Yorkshire Dales National Park)	60%	37%	-23%
If staying overnight, how many nights have you spent during your stay?	Mean number	4.6	3.3	-1.3
How many adults (aged 16 and over) are in your group today?	Mean number	2.8	4.8	2.0
Region of UK	North West	17%	54%	37%
	Yorkshire and The Humber	41%	11%	-30%
Before I spoke to you today, were you aware that this area was a part of the Yorkshire Dales National Park?	Yes, definitely / Yes, possibly	96%	79%	-17%
How did you travel here today?	Private car/van	89%	72%	-17%
	Motorbike	1%	20%	19%
Which of the following online sources did you use when planning your trip to the Yorkshire Dales?	Traveller review websites	13%	0%	-13%
	Google	44%	30%	-14%
	Didn't use online sources	45%	62%	17%
What other information did you refer to, to plan your visit	OS or other Map	40%	25%	-15%
	Printed Leaflet	14%	4%	-10%
	Guide Book	15%	3%	-12%
	Information from friends/family	18%	7%	-11%
	Didn't use any information to plan visit	32%	56%	24%

Question	Category	Sites used in previous research	New sites used in 2017 research (Orton & Devil's Bridge)	Difference
During your visit which of the following sources of information have you or will you use to look for things to see and do?	Websites	25%	14%	-11%
	National Park Visitor Centre	32%	10%	-22%
	Brochures/leaflets in accommodation	29%	10%	-19%
With regards to the Yorkshire Dales National Park, what do you see as its special qualities?	Walks and walking	37%	23%	-14%
	Clean/ unpolluted	12%	3%	-9%
	Barns	12%	4%	-8%
	Waterfalls	17%	7%	-10%
Thinking broadly about your decision to visit the Yorkshire Dales, what was it that attracted you to visit here on this occasion?	To visit friends or family who live here	5%	14%	9%
	Easy to get to	14%	0%	-14%
What activities have you or will you participate in during your visit today?	Cafe / tea room	62%	77%	15%
	Walking (more than one hour)	61%	24%	-37%
	Country pub	50%	27%	-23%
	Visit a National Park Visitor Centre	29%	7%	-22%
	Visit a heritage or historic site	15%	6%	-9%
What is, or will be, your main activity today?	Cafe / tea room	2%	13%	11%
	Walking (more than one hour)	46%	17%	-29%
	General sightseeing	19%	30%	11%
Has anything spoiled the enjoyment of your visit to the Yorkshire Dales today?	Nothing	74%	90%	16%
During your visit to the Yorkshire Dales have you used any of the following facilities or services?	Toilets	71%	49%	-22%
	Car parks	79%	61%	-18%
	Rights of way (footpaths)	58%	32%	-26%
	Information boards	40%	11%	-29%
	National Park Leaflets	25%	4%	-21%
	National Park Centres	29%	3%	-26%
	Wi-fi or mobile coverage	36%	23%	-14%
	Accommodation	41%	21%	-20%

### 3 CONCLUSIONS

- 3.1 This customer survey in 2017 updated data on the characteristics, behaviour and attitudes of visitors to the YDNP previously collected in 2013. It also included an additional sample covering the extended National Park area by including 71 interviews conducted at Orton and Devil's Bridge. This provides some insight into visitors to the extended National Park area. Some key differences were that those who were visiting the new areas were less likely to be staying overnight, more likely to be from the North-West region of the UK, less likely to be aware that the areas was a part of the YDNP, use different sources of information, undertake different activities and have different views about the national park area.
- 3.2 The profile of visitors to the YDNP area was found to be broadly similar in 2017 to that found in the 2013 survey. Some key points here are:
- Around three-quarters of visitors to the YDNP are from within the more affluent social grades A, B and C1, with a quarter from the less affluent C2, D and E grades. This suggests that those from social grades C2/D/E are under-represented in visitors to the park – nationally in England and Wales almost a half of the population (47%) are from social grade C2/D/E and in the North West and Yorkshire and Humber regions 51% are from social grade C2/D/E.
  - Whilst not directly comparable to 2013, the survey this year shows that 7% of visitors were from the 'White Other' ethnic group. This includes UK residents from European countries, including Eastern Europe<sup>3</sup>.
  - The proportion of visitors with a long-term health issue or disability has been the same for both the 2013 and 2017 surveys. Just over one-in-ten were in a party where a member of the party had a health issue or disability.
  - The proportion of visitors who were 'day visitors' or 'staying visitors' has remained approximately the same between 2013 and 2017. However, the profile of 'staying visitors' appears to have changed. In 2017, a larger proportion of visitors were visiting the YDNP but staying overnight outside of the National Park.
  - The profile of 'staying visitors' also appears to have changed in terms of length of stay. The 2017 results show a larger proportion of staying visitors who were on short breaks, staying one or two nights rather than longer breaks of 4-6 nights. The proportion of staying visitors on weekly breaks is consistent between 2013 and 2017.
- 3.3 The results to the 2017 survey show a small, but significant increase in new visitors to the YDNP. The proportion of visitors who were on their first ever visit in 2017 is higher than in 2013, double the proportion in 2008 and is respectively 14%, 10% and 7%.
- 3.4 Visitors on their first ever trip were more likely to be 'staying visitors' than 'day visitors'. This was also the case for visitors who were on their first visit in the last 12 months and may be related to geography of home address. It does, however, show the significance of visitors having a good experience on their first visit and then going on to become repeat visitors.

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<sup>3</sup> In the 2011 Census, the 'White other' group had increased by 1.1 million since 2001. Amongst this group, people from Poland as a country of birth were the second largest group of non-UK born residents in 2011.

- 3.5 The results for regular visitors, those who are on their first ever visit, and those who are on their first visit for 12 months provides a segmentation of visitors to the YDNP. Further analysis could be undertaken to profile each of these three segments with the objective of supporting marketing decisions and interventions by the YDNPA and others.
- 3.6 Web-searching, particularly through Google, are very common amongst visitors planning a trip to the YDNP. This is especially the case for visitors staying overnight, where over a half had sourced information through Google when planning their trip. Offline sources such as OS and other maps are still popular in planning a trip to the YDNP, but use of other offline sources is diminishing over time, as Google and other online approaches become the main source of information. However, getting information from family and friends in planning a trip to the YDNP appears to have increased over time. This highlights the importance of recommendation and 'word of mouth' in developing marketing strategies to attract visitors to the National Park.
- 3.7 Walking is clearly a key activity that attracts visitors to the YDNP. Almost two-thirds of visitors said they have had a walk (for more than an hour) during their visit; just under a half said that walking was their main activity of their visit. Many other services benefit from visitors attracted to the Park for walking, including cafés, pubs, and shops. Visiting attractions was the main activity of the visit for less than one-in-ten visitors, although almost a quarter said they would visit an attraction as part of their visit.
- 3.8 There are strong social grade differences in the activities undertaken as part of a visit to the YDNP. Those in social grade C2/D/E were less likely to have taken part in a walk of an hour or more or to say that walking was the main activity of their visit than those from A/B/C1 groups. Visitors from social grades C2/D/E were also more likely to visit YDNP for general sightseeing than visitors from A/B/C1 grades.
- 3.9 The results to the 2017 survey show some increases in the usage of the National Park facilities and services over time. Cafés, pubs, restaurants and rights of way (footpaths) were two aspects that have seen large increases in usage over time. For the first time a question was asked about Wi-fi or mobile coverage, this was used by over a third of visitors during their visit.
- 3.10 Visitors to the YDNP are, in the vast majority of cases, very satisfied with their visit. The results to the 2017 survey show a continued rise in satisfaction levels compared to those in 2013, 2008, and 2002.
- 3.11 Satisfaction with particular facilities and services has also increased between 2013 and 2017. Perhaps the most notable has been the increase in satisfaction with the National Park Centres, which show an increase in satisfaction of over 10% between the 2013 and 2017 surveys from 83% to 95%.
- 3.12 The survey results also show very high levels of likely recommendation for the YDNP area. Over nine out of ten visitors were very likely to recommend the area to friends and family. This is common to all visitors regardless of social grades or whether a day or staying visitor. The recommendation scores translate into an extremely high Net Promoter Score; one that exceeds major household named

brands. This is a key strength that could be utilised in marketing the National Park and in attracting under-represented groups.

- 3.13 There are a number of key differences between the 'new' and 'old' areas of the National Park and this needs to be monitored in future surveys, with the possibility of using 'pulse' surveys in those areas between this and the next full survey in 2021.

**Information by Design  
March 2018  
Final Draft**

## APPENDIX 1 - DEMOGRAPHICS

Gender				
	Survey	North West	Yorkshire and The Humber	England and Wales
Male	50%	49%	49%	49%
Female	50%	51%	51%	51%
Transgender	0%			
Prefer not to say	0%			

Age				
	Survey	North West	Yorkshire and The Humber	England and Wales
16-24	2%	15%	16%	15%
25-34	11%	16%	16%	17%
35-44	11%	17%	17%	17%
45-54	21%	17%	17%	17%
55-64	27%	15%	15%	14%
65+ years	29%	20%	20%	20%

Social Grade				
	Survey	North West	Yorkshire and The Humber	England and Wales
AB	35%	20%	19%	23%
C1	41%	30%	29%	30%
C2	18%	22%	23%	22%
DE	7%	28%	29%	25%

Ethnic Group				
	Survey	North West	Yorkshire and The Humber	England and Wales
White British	91%	87%	86%	80%
Other White	7%	3%	3%	5%
Mixed	2%	2%	2%	2%
Asian	1%	6%	7%	8%
Black	0%	1%	2%	3%
Other	0%	1%	1%	1%



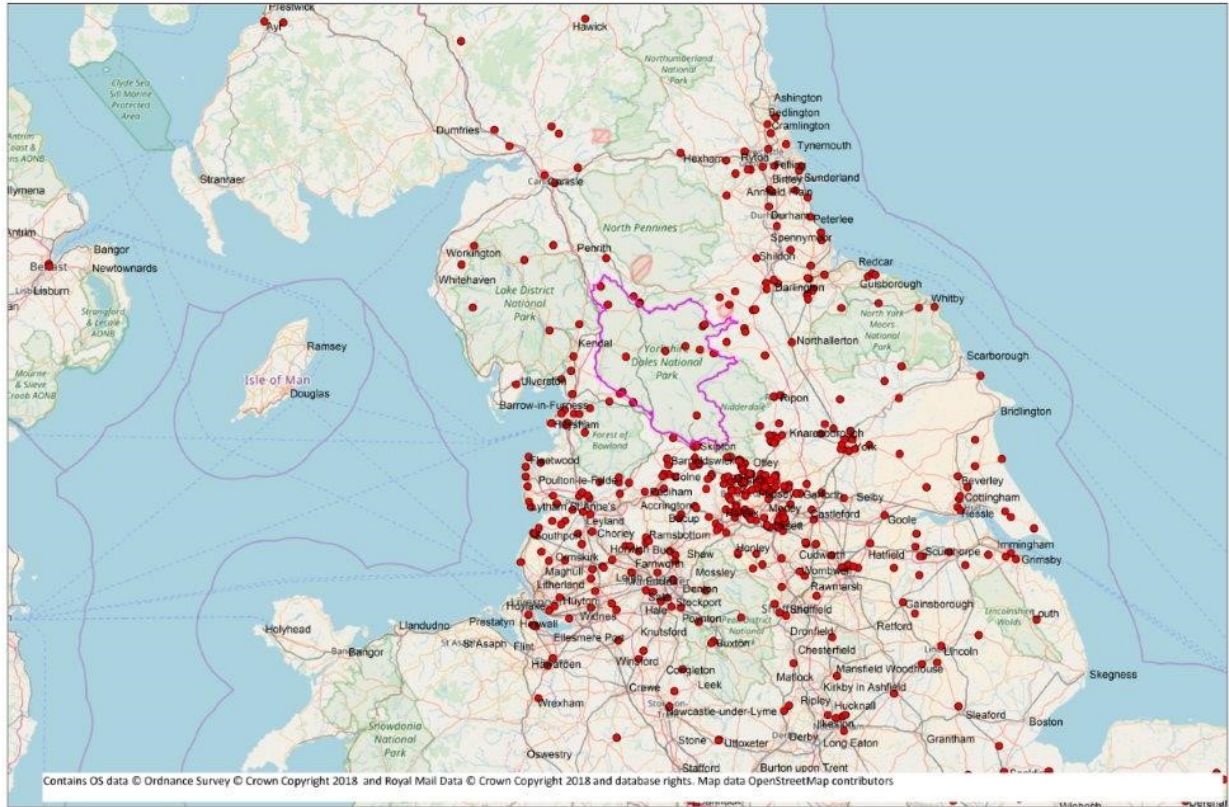
<b>Do you or any of your party have a long-standing health issue or disability that limits your daily activities?</b>				
		Survey	North West	Yorkshire and The Humber
Yes (on survey) / Day-to-day activities limited a lot / a little (2011 census)	12%	20%	19%	18%
No (on survey) / Day-to-day activities not limited (2011 census)	88%	80%	81%	82%
Don't know	0%	-	-	-

APPENDIX 2 – HOME LOCATIONS OF INTERVIEWEES

## Home locations of interviewees in YDNP



### Home locations of interviewees in YDNP



APPENDIX 3 – SURVEY QUESTIONNAIRE

1.	Which of the following best describes your visit today? Would you say you are.... <b>Single response</b>						
	On a <b>day Visit</b> from home <u>within</u> the Yorkshire Dales National Park	On a <b>day Visit</b> from home <u>outside</u> the Yorkshire Dales National Park	Staying <b>overnight in</b> the Yorkshire Dales National Park	Staying <b>overnight outside</b> the Yorkshire Dales National Park	On a regular shopping trip	On a business trip/it's my place of work	On a short visit, e.g. dog walking or passing through
	1	2	3	4	5	6	7
	<b>Go to Q3</b>	<b>Go to Q3</b>	<b>Go to Q2</b>	<b>Go to Q2</b>	<b>Close</b>	<b>Close</b>	<b>Close</b>

2.	If staying overnight, how many nights have you spent during your stay? <b>Enter no. of nights</b>	
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3.	How many adults (aged 16 and over) are in your group today? <b>Enter no. of adults</b>	
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4.	How many children (under 16 years of age) are in your group today? <b>Enter no. of children</b>	
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5.	Please could I take your home postcode? <b>Enter postcode</b> <i>(If do not want to supply postcode, go to Q6. If do supply postcode, go to Q7)</i>	
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6.	Where do you live? Enter Town and Country. If Overseas also record country	
	Town:	
	County:	
	Country: (If overseas, also take Country)	

7.	Before I spoke to you today, were you aware that this area was a part of the Yorkshire Dales National Park? <b>Single response</b>				
	Yes, definitely	Yes, possibly	No, possibly not	No, definitely not	Don't know what a National Park is
	1	2	3	4	5

8.	How did you travel here today? <b>Multiple response</b>								
	By private car/van	Motorbike	Public bus/coach	Private bus/coach	Train	Bicycle	On foot	On horse back	Other
	1	1	1	1	1	1	1	1	1

9.	Approximately how many times, (including today), have you visited the Yorkshire Dales National Park in the last 12 months? <b>Single response</b>	Numerous times	Today is my first time in the last 12 months	First ever trip
		1	2	3

**10.** Which of the following online sources, if any, did you use when planning your trip to the Yorkshire Dales? **Multiple response. SHOW CARD 1**

Yorkshire Dales National Park website	Traveller review websites	Transport provider website	Individual business/ attraction website	Magazine/ newspaper website	Google	Other search engines
1	2	3	4	5	6	7
Facebook	Twitter	Pinterest	Smartphone App	Didn't use online sources	Other website (specify)	Other:
8	9	10	11	12	13	

**11.** What other information did you refer to, to plan your visit? **Multiple response. SHOW CARD 2**

OS or other Map	Printed Leaflet	Magazine Article	Guide Book	The Visitor magazine	Radio/TV programme	Public transport information
1	2	3	4	5	6	7
Contacted a National Park Visitor Centre	Information from friends/family	Didn't use any information to plan visit		Other (specify)	Other:	
8	9	10		11		

**12.** During your visit which of the following sources of information have you or will you use to look for things to see and do? **Multiple response. SHOW CARD 3**

Talking with locals	Google maps	Websites	National Park Visitor Centre	Personal advice from accommodation provider	Brochures/leaflets in accommodation	Apps	Social media sites	Traveller review/ratings	Other (please specify below)
1	2	3	4	5	6	7	8	9	10
Other:									

**13.** With regards to the Yorkshire Dales National Park, what do you see as its special qualities? **Multiple response. Do not prompt. Interviewer to probe: "can you think of anything else?" before moving on.**

Open space/freedom/remoteness	Natural Beauty/scenery/views	Walks and walking	Villages/traditional buildings	Clean/unpolluted	Barns and walls	Waterfalls	Wildlife
1	1	1	1	1	1	1	1
Limestone scenery	Peaceful/tranquil	Hills/dales/valleys	Outdoor activities	Hay meadows	Social history	Dark skies	Other (state below)
1	1	1	1	1	1	1	1
Other:							

**14.** Thinking broadly about your decision to visit the Yorkshire Dales, what was it that attracted you to visit here on this occasion? **Do not prompt. Multiple response.**

The scenery, landscape, connecting to nature	One of my favourite places/always come here	The history and culture	Been before and wanted to come back	Some where to go with good weather forecast	To visit friends or family who live here	To enjoy an outdoor activity
1	1	1	1	1	1	1
To go to a visitor attraction	For a friends and family event or celebration	To attend a show or festival	To get away from it all/for peace and tranquillity	To take part in an outdoor challenge	Easy to get to	Other (state below)
1	1	1	1	1	1	1
Other:						

<b>15.</b>	a) What activities have you or will you participate in during your visit today? <b>Multiple response SHOW CARD 4</b>		
	b) What is, or will be, your MAIN activity today? <b>Single response</b>		
		a)	b)
	Cafe / tea room	1	1
	Walking (less than one hour)	1	2
	Walking (more than one hour)	1	3
	General sightseeing	1	4
	Having a picnic	1	5
	Country pub	1	6
	Shopping	1	7
	Car touring	1	8
	Visit a National Park Visitor Centre	1	9
	For wildlife watching	1	10
	Visit an attraction	1	11
	Visit a heritage or historic site	1	12
	Go cycling or mountain biking	1	13
Come for a special event	1	14	
Other (please specify)	1	15	
Other:			

<b>16.</b>	Has anything spoiled the enjoyment of your visit to the Yorkshire Dales today? <b>Do not prompt. Multiple Response.</b>							
	Bad weather	Litter	Too many people	Lack of waymarking	Start of visit	Traffic congestion on road	Finding somewhere to park	Off road trail bike/4x4 noise
	1	1	1	1	1	1	1	1
	Motorbikes on road	Toilet facilities	Facilities at National Park Information Centre	Condition of path after repair work	Condition of path rutted/muddy/boggy	Condition of path rocky/stony	Nothing	Other (please state below)
1	1	1	1	1	1	1	1	
Other:								

<b>17.</b>	Taking into account what you have enjoyed about your visit and what (if anything) has spoilt your visit, on a scale of 1 - 6 (where 1 is not at all satisfied and 6 is very satisfied) how satisfied or dissatisfied are you overall with your visit to the Yorkshire Dales National Park? <b>Single response</b>						
	Not at all satisfied					Very satisfied	Don't know (DNRO)
	1	2	3	4	5	6	7

<b>18.</b>	a) During your visit to the Yorkshire Dales have you used any of the following facilities or services? <b>Multiple response SHOW CARD 5</b>							
	b) On a scale of 1 - 6 (where 1 is not at all satisfied and 6 is very satisfied) how satisfied or dissatisfied were you with the standard of...? <b>Read out those used in a). Single response for each row used.</b>							
		a)	b)					
		Used?	Not at all satisfied					Very satisfied
	Toilets	1	1	2	3	4	5	6
	Car parks	2	1	2	3	4	5	6
	Rights of way (footpaths)	3	1	2	3	4	5	6
	Café/pub/restaurants	4	1	2	3	4	5	6
	Information boards	5	1	2	3	4	5	6
	National Park Leaflets	6	1	2	3	4	5	6
	Guided walks	7	1	2	3	4	5	6
	National Park Centres	8	1	2	3	4	5	6
	Picnic sites	9	1	2	3	4	5	6
	Public transport information	10	1	2	3	4	5	6
Public transport provision	11	1	2	3	4	5	6	
Wi-fi or mobile coverage	12	1	2	3	4	5	6	
Accommodation	13	1	2	3	4	5	6	

19.	On a scale of 0 - 10 (where 0 is not at all likely and 10 is very likely) how likely or unlikely are you to....? <b>Single response</b>											
		Not at all likely										Very likely
	a) return to this area in the next two years	0	1	2	3	4	5	6	7	8	9	10
b) recommend this area to your friends and family	0	1	2	3	4	5	6	7	8	9	10	

20.	Which of these age bands do <b>you</b> fit into: <b>Single response</b>						
	16-24	25-34	35-44	45-54	55-64	65+ years	Prefer not to say (DNRO)
	1	2	3	4	5	6	7

21.	What is the occupation of the main wage earner in your household? If retired, please give previous occupation and write 'retired' before occupation

22. What is your ethnic group? <b>Single response, circle number SHOW CARD 6</b>					
White		Mixed		Asian or Asian British	
1	British	5	White and Black Caribbean	9	Indian
2	Irish	6	White and Black African	10	Pakistani
3	Gypsy or Irish Traveller	7	White and Asian	11	Bangladeshi
4	Other White background*	8	Other Mixed/multiple ethnic background*	12	Chinese
				13	Other Asian background*
Black or Black British		Other			
14	African	17	Arab		
15	Caribbean	18	Other*		
16	Other Black/African/ Caribbean background*	19	Prefer not to say		
*Please state others:					

23.	And are you:	Male	1	Female	2	Transgender	3	Prefer not to say (DNRO)	4
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24.	Do you or any of your party have a long-standing health issue or disability that limits your daily activities? <b>Single response</b>	Yes	No	Don't know (DNRO)
		1	2	3

END OF QUESTIONNAIRE – THANK AND CLOSE

**APPENDIX 4 – ‘OTHER’ RESPONSES TO ‘THINKING BROADLY ABOUT YOUR DECISION TO VISIT THE YORKSHIRE DALES, WHAT WAS IT THAT ATTRACTED YOU TO VISIT HERE ON THIS OCCASION?’**

3 peaks	New motorhome, checking new motorhome and places
Accommodation	Nice cafes
Always wanted to come	Nice hotel - in Ingleton - Masons Arms
Anniversary	nice to go
As far as bus goes	Nostalgia
Based in army - Catterick	Not been before
Bike ride	Not been here before but everywhere else
Birthday treat	Nothing
Borrowing friends home	Noticed on a map, so something different than Lake District
Break	On holiday
Bringing daughter to wedding	On route - passing through
Cafe	On syllabus
Came across it by chance	On the path top home
Came by chance	On way to Lake District
camping, breakfast	On way to Lakes, brought American friends
Campsite	Organised trip
Caravan	Organised trip/ retreat
Caravan about 10 miles away	Outdoors
Caravan in Kirkby Stevens	Own caravan here
Caravan site was available	Particular hotel, dog friendly
Cheap train tickets	Particular Walk
Cheese factory	Partner teaches in area
Cheese place	Partner visited previously
Chose this pub to come and eat	Passing through
Climbing	Peace and quiet
Coach trip	Peaks
Coast to coast walk	Pen-y-Ghent
Coffee shop, chocolate	Pick up grandchildren
Come back every anniversary	Planned route
Come every year	Planned trip
Come to the lakes	Planning and testing a sponsored walk
Contractual obligations	Popped in
Cycling	Practical stop to Lake District from Manchester
Damming a stream with kids	Pub
day out	Push bike riding
Day out , fresh air	Recommendation
Day out, anniversary	Recommendation from friends
Day out, this is our coffee stop	Recommendation of hotel
Decided to have day out	Recommended
Dog	Recommended, weather
Dog walking	Red squirrels
Done moors and wanted to see dales`	Red squirrel trail
Drive	Reminiscence
Drive around	Reunion
Drive around, a wander	River walk
drive out	Ribblehead viaduct
Duke of Edinburgh	Run out
Enjoy walks and countryside	Run out on bike
Falls	Saw in book and wanted to walk



Family day out	Saw mill in magazine and friend Clare
Family holiday destination	Saw on to , Julia Bradbury
Family originally from area	Scenery
Family reunion	School trip / expedition
Filming documentary	Scout trip
First free day	See the bikers
Fish and chip shop	Shop - seen on previous visit
Fishing	Shops
Food	show family area
Fresh air	Show friend from Oslo
Friendliness	Show friends
Friends	Sightseeing
Friends bought cafe which opens on Saturday	Size of house
Geology	Skipton Market
Get away from work and kids, initially races in York	something different
Gift bought from us	Somewhere remote, lunch
Golden Wedding Anniversary for a week of quiet reflection	Son doing project on rivers
Good B&B	Spending event in LakeDdistrict
Good deal on hotel	Spur of the moment
Good food	Steam train
Good pit-stop and refresh	Steam train in Ribblesdale
Good place for trip	Stopped because of rain
Grandchildren live near	Suggested for its beauty
Have caravan	Sun shining
Have caravan and easy to get to	Surprise from son
Have own place	Take son to Buckden Pike
Heard good things about it	tea room
Hill walk	The brewery, good ride out, attractive
Holiday home	The pub - Listers Arms
Home away from home	The weather
Hot tubs	This walk with a cafe
Hotel and area dog friendly	Three Peaks
Hotel list, suggestion from there	To walk a specific route
House sitting	Top 10 prettiest villages in the area
Husbands birthday plans and somewhere close	Tour de France 2014
Ice cream	Town to town walk
Ice cream very good from chocolate shop	training for a run
Ice cream, Community Garden (Reeth)	University trip
Impromptu decision	Used to live here
Isolation	Uster arms - voucher for Farley so they can stay
It's further, it is a summer visit, different, change	Variety of places
James Harriet	Vet Programme
Last time coming to Yorkshire as husband very ill	Visit a new area
Lead a cycle tour and was looking at route	Visit a shop
Little trip out	Visiting area for future plans, scout trips
Local pubs get away from wife	Visiting daughter
Lost passport, could not go abroad, very competitive price	Walks / location

Love it here	Wanted to go to moors but found a nice place to camp
lovely walking country	Wanted to see Hawes
low cost	Wanted to visit
It was a nice day out	Watched the walking (Bronzes)
Lunch	Weather. Not school holidays
Lunch / Walking	Weld
Malham Cove	Wensley near to Aysgarth train station
Malham Cove, close to where we live	Wensleydale trip
Meet with family	Wilderness
Meeting for lunch	Won a holiday in a yurt 2 nights
Motorbike gathering	Work shop
Motorbike tour	Working and leisure leaflets
National Park - a lot of nature. Visiting all National Parks	Workshop
Never visited before	

**END OF REPORT**