



Results of the Dales Tourism Business Survey 2012

Background

A survey of tourism businesses in the Yorkshire Dales National Park, Nidderdale Area of Outstanding Natural Beauty and surrounding areas was carried out between January and April 2012. The research was organised by the Yorkshire Dales National Park Authority on behalf of Dales Tourism – the steering group directing work on sustainable tourism in the Yorkshire Dales.

The research used both an on-line questionnaire which was advertised through press releases and e news, and a telephone survey conducted by QA Research to gain further responses. A good level of responses was achieved, with the views and opinions of 132 tourism businesses of varying size and geographical location gathered. The results of this survey will help to inform the developing Sustainable Tourism Strategy for the Yorkshire Dales.

This was the first survey of this type that has been carried out, and so the information gained cannot be compared to any previous findings, but will form a base from which future actions can be prepared. The results of the survey are presented below. Where open questions were answered allowing businesses to give a literal response, the replies have been grouped to show the main headings and key areas addressed.

About your business

This section provides basic information about the businesses which responded to the survey including where they are located, how many people they employ and how long they have been operating.

1. Where is your business located?

Answer Options	Response Percent	Response count
My business is in the Yorkshire Dales National Park (YDNP)	56.1%	74
My business is in the Nidderdale Area of Outstanding Natural Beauty (NAONB)	10.6%	14
My business is within 5 miles of these designated areas	28.8%	38
More than 5 miles from the designated areas	4.5%	6

A good geographic spread of businesses was achieved with the majority being located in the National Park reflecting its larger size, and a smaller number of businesses surveyed in Nidderdale AONB. The numbers of businesses involved means that breaking the detailed results down into geographic areas would not be statistically valid.

2. Which of these sectors is your business involved?

Answer Options	Response Percent	Response count
Food and drink	41.7%	55
Guest House / B&B	32.6%	43
Self catering accommodation	23.5%	31
Visitor attraction	16.7%	22
Hotel	14.4%	19
Retail / shop	13.6%	18
Campsite	13.6%	18
Caravan or holiday home park	9.8%	13
Group accommodation	6.1%	8
Outdoor activity provider	3.8%	5
Tour operator	0.8%	1
Other (please specify)	11.4%	15

Again, a good spread of different businesses was involved with strong representation by the accommodation and food and drink sectors as well as visitor attractions and retail. Businesses included in the 'other' sector included cafes, wedding venues, farms, craft workshops and coach operators.

3. How long have you been running your business?

The majority of the businesses in the Dales are well established with the majority of respondents having been running their business for over 11 years.

Answer Options	Response Percent	Response count
Less than 1 year	3.9%	5
1 to 5 years	24.0%	31
6 to 10 years	20.2%	26
11 and above	51.9%	67

4. How many people does your business currently employ?

The vast majority of tourism businesses surveyed are small and employ between one and five full time staff. Additional seasonal staff are employed by 46 businesses – 37% of those that responded to this question.

Answer Options	1-5	6-10	11-15	16-20	21 and above
Full time	91	14	2	2	3
Full time seasonal	11	2	1	0	0
Part time	49	9	2	2	2
Part time seasonal	23	5	0	3	1

5. Does your business hold any accreditations or awards?

Answer Options	Response Percent	Response count
Adventure Activities Licensing Scheme (AALA)	1.7%	2
Green Tourism Business Scheme (GTBS)	3.4%	4
Visitor Attraction Quality Assurance Scheme (VAQAS)	2.5%	3
Welcome to Yorkshire member (WTY)	21.8%	26
Accommodation quality rating (eg Visit Britain/AA)	41.2%	49
Other (please specify)	58.8%	70

The majority of businesses (70%) have some form of quality accreditation or award with only 40 respondents answering 'no' or skipping the question. 22% of businesses are Welcome to Yorkshire members and 41% of businesses hold an accommodation quality rating. However, many of the large number of businesses who replied under 'other' specified their accommodation award grading level which suggests that this is actually higher. Other accreditations included awards such as Hygiene Awards, Breakfast Awards and Trip Advisor recommendations.

6. Are you a member of any businesses association, trade organisation or tourism/promotion group?

Answer Options	Response Percent	Response count
No	28.5%	37
Yes – please state which one(s)	71.5%	93

The majority of businesses are members of a businesses association, trade organisation or tourism/promotion group. For many this is through being a member of Welcome to Yorkshire, but for others it is through a local business association such as those in Upper Wensleydale or Grassington.

Your business performance

7. Over the last three years, would you say that your business income has:

Answer Options	Response Percent	Response count
Declined	25.2%	32
Stayed about the same	31.5%	40
Grown	31.5%	40
I have owned my business for less than three years	11.8%	15

Given that the last three years have been difficult financially, the fact that 63% of respondents would say that their business income has either grown or stayed about the same over the last 3 years should be seen as a strong performance. However, with a quarter (25.2%) of respondents saying that their income has declined there is still considerable cause for concern.

8. In which months of the year, if any, do you particularly wish to see more business?

(Please tick all that apply)

Answer Options	Response Percent	Response count
January	47.6%	60
February	53.2%	67
March	42.1%	53
April	34.1%	43
May	25.4%	32
June	27.0%	34
July	25.4%	32
August	30.2%	38
September	26.2%	33
October	34.9%	44
November	39.7%	50
December	34.9%	44
I'm happy with the level of business I have	11.1%	14

Nearly 90% of businesses want to see more trade during the year. A higher percentage of respondents would wish to see more business during the winter months of January/February/March.

9. Please indicate how important each of the following is in promoting your business.

Answer Options	not at all important	somewhat important	Very important	Rating Average	Response Count		
Word of mouth/personal recommendation	1	1	1	8	117	4.87	128
Repeat customers	2	0	3	9	78	4.75	92
Welcome to Yorkshire/Cumbria Tourism	19	21	36	21	26	3.11	123
Yorkshire Dales National Park publications /website/social media	31	23	31	21	17	2.76	123
Nidderdale AONB publications/website/social media	47	8	8	7	6	1.91	76
Tourist information Centres/National Park Centres	27	17	25	29	25	3.07	123
Holiday/booking agency	52	7	10	22	23	2.62	114
Your own leaflet/brochure	18	15	18	27	43	3.51	121
Your own website	2	0	5	18	98	4.71	123
Other websites	11	8	25	32	45	3.76	121
Social media	42	16	23	15	22	2.65	118
Having a recognised green accreditation standard	51	10	21	13	7	2.17	102
Attracting passing trade	25	22	22	21	30	3.08	120
Other	1	3	0	0	4	3.38	8

A very high number of respondents believe that Word of mouth/personal recommendation and repeat customers is very important to the promotion of the business. Having your own website is also very important to the business, with other websites seen as less important. The majority of respondents see having a recognised green accreditation standard as not very important to their promotion. The results with regard to social media are interesting in that whilst 36% of respondents do not see it as at all important, 19% see it as very important. How many of the respondents who do not see social media as relevant are actually using it is unknown.

Environmental Practices

Businesses were asked about their current environmental practices and whether they had taken any action on a range of measures. Across the businesses surveyed, these issues are clearly of considerable interest and the level of activity already undertaken is high. Businesses have a clear idea of what is of interest to customers with information on local produce and local walks, cycle rides and public transport seen as important.

10. Generating renewable energy

Answer Options	None		some		Significant	Rating Average	Response Count
Your level of interest	19	15	26	25	43	3.45	128
Of interest to your customers	53	20	33	13	6	2.19	125
Have taken action	46	18	28	12	22	2.57	126

For many businesses there may be limited, or no opportunities for energy generation depending on their type of business and building. However, there is still a significant level of interest amongst businesses and what may be a surprising number that have taken significant action on this issue.

11. Energy Saving Measures

Answer Options	None		some		Significant	Rating Average	Response Count
Your level of interest	8	2	17	27	74	4.23	128
Of interest to your customers	39	23	39	15	8	2.44	124
Have taken action	14	10	33	34	35	3.52	126

Not surprisingly given the impact of energy costs on a business, there is significant interest in actions to reduce usage, and only 11% of businesses are yet to take any action at all.

12. Reducing your water use

Answer Options	None		some		Significant	Rating Average	Response Count
Your level of interest	13	7	24	27	56	3.83	127
Of interest to your customers	54	20	35	8	7	2.15	124
Have taken action	29	22	27	20	25	2.92	123

Reducing water use is still seen as a significant issue but is one that is not seen as important to the customer, and is something where less action has been taken.

13. Reducing waste produced

Answer Options	None		some		Significant	Rating Average	Response Count
Your level of interest	5	6	15	26	76	4.27	128
Of interest to your customers	32	15	43	19	17	2.79	126
Have taken action	6	8	26	29	57	3.98	126

Reducing waste produced is of significant interest and one where the vast majority of businesses are taking some action. This is seen as an issue of some interest to customers.

14. Using and promoting local produce

Answer Options	None		some		Significant	Rating Average	Response Count
Your level of interest	5	4	11	23	84	4.39	127
Of interest to your customers	13	9	29	33	44	3.67	128
Have taken action	8	7	13	21	78	4.21	127

The results of the survey clearly show that using and promoting local produce is a key issue – seen as of significant interest to both the businesses and their customers.

15. Providing information on public transport and walks and cycle rides

Answer Options	None		some		Significant	Rating Average	Response Count
Your level of interest	6	3	11	26	82	4.37	128
Of interest to your customers	9	4	32	31	51	3.87	127
Have taken action	10	5	12	28	70	4.14	125

As with local produce, providing information on public transport, walking and cycling is a key issue.

16. Provide information on, or take an active part in, conserving the natural and cultural heritage of the area

Answer Options	None	some	Significant	Rating Average	Response Count		
Your level of interest	8	5	11	25	79	4.27	128
Of interest to your customers	13	7	37	36	35	3.57	128
Have taken action	11	6	21	29	57	3.93	124

Although seen as of less interest to their customers, businesses still believe that providing information, and taking part, in conservation work is important and an area where most have acted.

Improving tourism in the Dales

Respondents were asked to indicate first, how well they think the Dales currently performs as a tourism destination in relation to each of the following areas:

- Marketing and information;
- Product development and improving quality; and
- Partnership, communication and coordination

Respondents were then asked about how important each of these aspects is to their business. Of interest is how well these two factors match up, and whether there are areas where performance is seen as poor but which are regarded as important.

17. Marketing and information

Performance						
Answer Options	5= very well	4	3	2	1= badly	Response Count
Increasing the awareness of the Dales as a destination	29	40	25	21	6	121
Increasing awareness of the Dales as an environmentally friendly destination	11	26	41	25	12	115
Tourism pages of yorkshiredales.org.uk	11	21	21	11	7	71
Tourism pages of nidderdaleaonb.org.uk	6	8	16	1	1	32
Tourism pages of yorkshire.com	18	25	22	14	12	91
Identification and promotion of local produce, arts and crafts	13	29	38	16	13	109
Promotion of guided walks, events and festivals	25	38	29	14	10	116
Quality of the Yorkshire Dales National Park Authority's publication 'The Visitor'	18	45	29	10	9	111

17. Marketing and information (contd)

Importance						
Answer Options	5= very important	4	3	2	1= not important at all	Response Count
Increasing the awareness of the Dales as a destination	107	12	3	1	2	125
Increasing awareness of the Dales as an environmentally friendly destination	49	43	23	2	5	122
Tourism pages of yorkshiredales.org.uk	27	17	19	10	19	92
Tourism pages of nidderdaleaonb.org.uk	16	5	7	5	28	61
Tourism pages of yorkshire.com	37	22	20	12	16	107
Identification and promotion of local produce, arts and crafts	52	35	16	9	7	119
Promotion of guided walks, events and festivals	62	30	15	8	6	121
Quality of the Yorkshire Dales National Park Authority's publication 'The Visitor'	35	36	18	9	16	114

Perhaps unsurprisingly, businesses see marketing and information as very important areas of work which impact on their enterprises. Performance in this area is seen as reasonable suggesting that more needs to be done, but this may involve thinking about new ways of working given the constraints on public sector budgets.

18. Product development and improving quality

Performance						
Answer Options	5= very well	4	3	2	1= badly	Response Count
Provision for outdoor activities	27	39	31	12	5	114
Provision for nature tourism (eg bird watching)	19	26	37	12	13	107
Provision for people with poor mobility	8	19	41	23	16	107
Provision of buses and trains	7	16	29	36	27	115
Packaging of accommodation and activities in the Dales	7	17	36	22	14	96

18. Product development and improving quality (contd)

Importance						
Answer Options	5= very important	4	3	2	1= not important at all	Response Count
Provision for outdoor activities	56	34	16	3	11	120
Provision for nature tourism (eg bird watching)	42	30	27	9	11	119
Provision for people with poor mobility	45	23	26	13	11	118
Provision of buses and trains	52	30	16	9	11	118
Packaging of accommodation and activities in the Dales	32	27	20	13	19	111

In the field of product development there is a clear gap between current performance and what is seen as important. This is least in the provision of outdoor activities and greatest when it comes to the provision of buses and trains. Again, whilst these gaps need to be addressed there is also a degree of managing businesses expectations and clearly communicating with them about existing provision.

19. Partnership, communication and coordination

Performance						
Answer Options	5= very well	4	3	2	1= badly	Response Count
Opportunities for businesses in the Dales to work together	15	23	41	27	13	119
Keeping businesses up to date on tourism issues in the Dales	15	24	36	25	14	114
Update planning policies relating to business and tourism development	8	5	40	26	23	102
Liaising with communities about the impact of tourism	6	16	35	26	18	101

19. Partnership, communication and coordination (contd)

Importance						
Answer Options	5= very important	4	3	2	1= not important at all	Response Count
Opportunities for businesses in the Dales to work together	59	39	16	4	3	121
Keeping businesses up to date on tourism issues in the Dales	62	41	12	2	1	118
Update planning policies relating to business and tourism development	54	31	16	4	9	114
Liaising with communities about the impact of tourism	50	28	23	4	5	110

In the area of communication and working closely with businesses there is again a disparity between the importance of this and current performance. One of the ways in which this is being addressed is through the Dales Tourism Business Network which was the subject of the next question.

Have you heard of the Dales Tourism Business Network (www.dalestourism.com)?

Answer Options	Response Percent	Response Count
No	44.0%	55
Yes	56.0%	70

Respondents were also asked what activities the Business Network should engage in. There were a number of themes which emerged and a number of comments praising the work that is already happening.

What do you think it should do?

	Response Count
Facilitate business networking and communication	20
Promotion of area	10
Work to improved signage and reduce planning restrictions	5
Provision and promotion public transport	5
Improvements in infrastructure such as wet weather facilities, toilets and information centres	4

Opportunities and challenges

Businesses were asked what they saw as the main challenges and opportunities facing tourism in the Dales. Although this produced many different answers, a number of key themes and concerns emerged.

What do you think are the main challenges facing tourism in the Dales?

	Response Count
Financial climate	35
Cost of petrol/fuel	34
Transport issues	16
Bad weather/inaccurate weather forecasting	12
Improved promotion of area	12
The National Park Authority being restrictive in terms of planning	10
Competition from other areas/activities (in particular the Lake District)	8

Many of these key concerns such as the cost of fuel and the economic recession have no local solutions, and so the key challenges that could be addressed surround transport, promotion and planning.

What do you think are the main opportunities facing tourism in the Dales?

	Response Count
The unique landscape and beauty of the area	18
The financial climate (cost of holiday abroad v holiday in UK).	
Staycationing	14
The Dales TV coverage	11
Develop promotion and awareness of the area	8
Greater networking amongst businesses for promotion and joint activities	6
Quietness/undiscovered/place to get away from it all	6
Farming and local produce not used enough	4
Friendly and hospitable people	4

The positive side of the current financial problems is seen as an opportunity to build on the UK holiday market and 'staycations' by many businesses. However, the key opportunity is to use what businesses see as the key strength of the area – its beauty, landscape and tranquillity. A high number of responses referred to TV coverage of the Dales as being an opportunity, particularly referring to the recent TV series "The Dales".

Conclusions

This business survey provides much useful information on tourism businesses in the Dales and how they would like to see the tourism offer developed. Whilst it would not be possible to take forward everything on the 'wish list', many actions will be built in to the Sustainable Tourism Strategy and Action Plan for the Yorkshire Dales which is being developed for our re-accreditation as a EUROPARC area for sustainable tourism. The draft of this strategy will be available on www.yorkshiredales.org.uk in September.

The Dales Tourism Business Network, set up by the Yorkshire Dales National Park Authority and Nidderdale AONB and co-ordinated by Susan Briggs of The Tourism Network will continue to provide a focus for tourism businesses in and around the Dales, through its website www.dalestourism.com. Joining the network is the easiest way to ensure that you receive details of what is happening in the area.

The next opportunity for businesses to get together for networking and learning, through The Dales Tourism Business Network will be in **October 2012**. More information on these events and activities can be found on www.dalestourism.com and www.yorkshiredales.org.uk/dtbn .