Visitor Honeypot Sites Survey 2022

The purpose of this report

1. This report presents results from a visitor survey carried out by the Yorkshire Dales National Park Authority (YDNPA) during June 2022 at Hawes Dales Countryside Museum (DCM) car park, Reeth (village green near Hudson House), Grassington, Aysgarth Falls and Malham YDNPA car parks. The survey (**Appendix 1**) asked questions about car parks, information boards, toilets and usage of the on-site National Park Visitor Centre (Hawes, Grassington, Malham, and Aysgarth Falls) or at Reeth the partnership centre at Hudson House.

2. The purpose of the survey was to understand the demographics of visitors to these 'honeypot' locations, how they sought information, which on-site facilities they used and how they used them. The four sites owned by YDNPA (Hawes, Grassington, Malham and Aysgarth Falls) have had improvements in signage and free on-site leaflets to make them more welcoming to first time visitors.

Introduction to this survey

3. The survey was a face to face interview carried out by National Park Volunteers. In total 543 surveys were carried out across the 5 sites during June 2022. June was chosen because it coincided with the Queen's jubilee, included the school half term as well as being a long bank holiday weekend. Volunteers were asked to survey people at the end of their visit where possible.

4. The number of surveys at each site were Aysgarth 115, Grassington 131, Hawes 65, Malham 165, and Reeth 56. A smaller number of surveys were carried out in Reeth and Hawes for two reasons. Reeth and Hawes (DCM) had less survey days because of a lack of survey volunteers, and the volunteers also reported bad weather on the survey days. The sample size for Reeth and Hawes means that caution is required when looking at this data by location.

5. Survey days were spread across weekend / bank holiday days and weekdays at each site to ensure a broad a demographic and range of visitor types as possible. In total 367 surveys were completed on a weekday and 163 a weekend/bank holiday.

6. This survey gives in-depth information about visitors to five honeypot locations, and specifically four sites with visitor centres owned by YDNPA. It complements the 5 yearly National Park visitor survey, undertaken across the whole National Park since 2002. This shows some clear trends and change in usage of facilities over time.

Combined results for the 2022 surveys

7. A record 96% of those surveyed across the whole Yorkshire Dales National Park, said they were very satisfied with their visit to the National Park. These results represent a continued year on year increase in the proportion of visitors who were very satisfied with their visit over the past 20 years.

8. Recommendation levels were also high, with 94% of respondents very likely to recommend the National Park to friends and family, a high score in comparison with many national brands, and higher than the 91% scored in the 2017 survey.

9. Over three quarters of respondents said they felt natural beauty, scenery and views were special qualities of the Yorkshire Dales National Park, they also recognised - more than ever - the friendliness of Dales people, and its pubs and food. Less than half of visitors across the National Park (43%) were aged under 55 with 23% aged 16-44. The majority of visitors were domestic visitors from the UK; with 5% from overseas, so the National Park visitor profile was similar to before the Pandemic. Though significantly, of those who had visited the National Park before 2022, one in ten had first visited during the pandemic after COVID-19 restrictions ended in England.

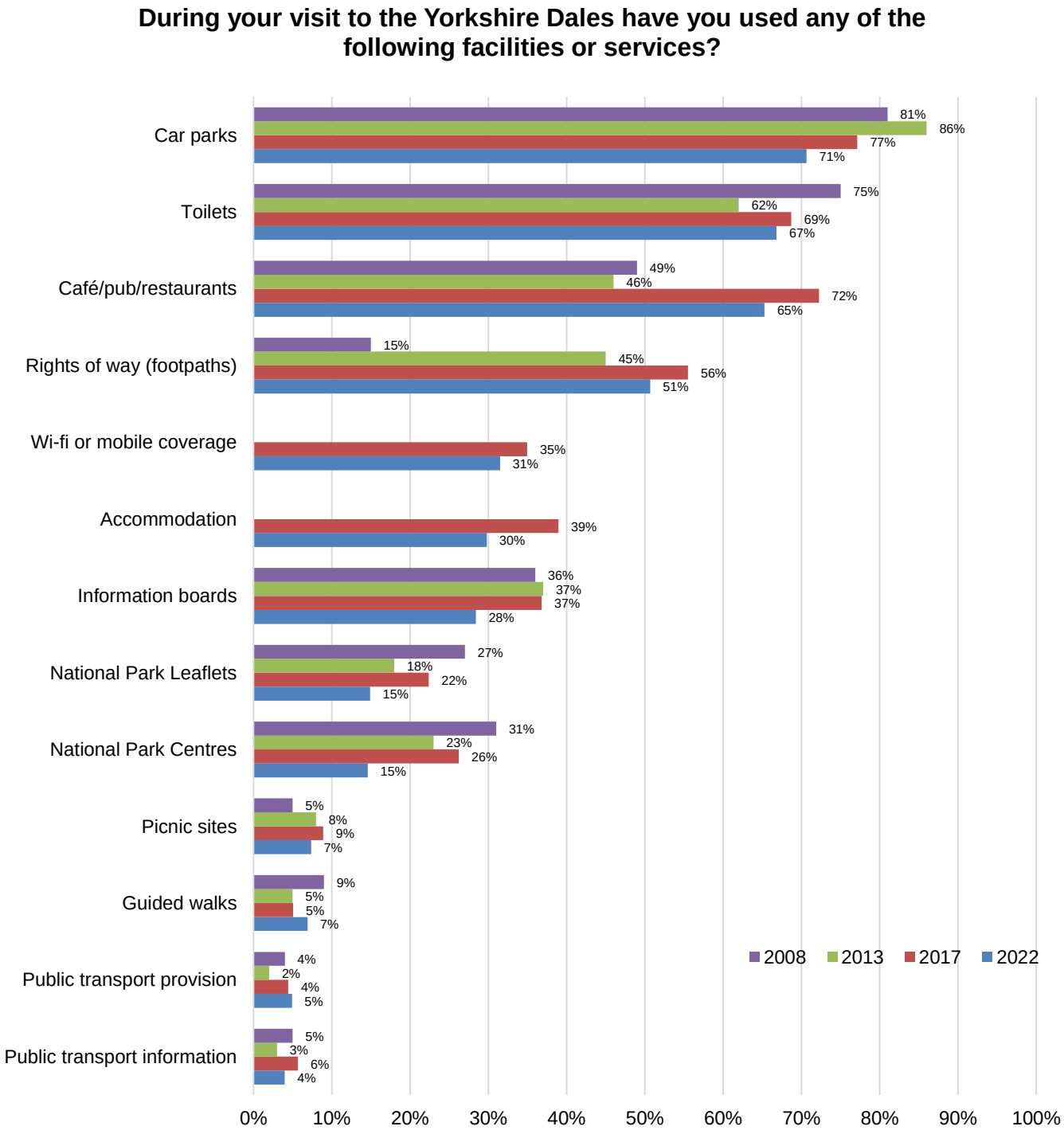
10. The honeypot location survey at five honey pot sites (Grassington, Malham. Hawes, Reeth, and Aysgarth Falls), reveals differences in visitor demographics and ethnicity across these sites with Malham appealing more to younger visitors - one in three visitors here were aged 44 years old or less, compared to one in five visitors at Grassington Reeth and Aysgarth Falls - and also attracting the most ethnically diverse visitor profile. 1 in 10 visitors to Malham indicated they were from a Black, Asian or ethnic minority group and these groups are increasingly recommending Malham to their friends and family so they can experience the stunning landscape for themselves.

11. During the pandemic, Aysgarth Falls proved a popular destination for first time visitors to the Dales. Two years on, Aysgarth Falls continues to attract just over a third (36%) of first-time visitors, much more than any other site, with Malham 26% and Reeth 11% - Reeth is more popular with repeat visitors. This compares with 15% of visitors on their first visit across the National Park as a whole.

12. Visitors used different information sources to plan their visit depending on the site. At Aysgarth and Malham respondents had most frequently used a google search (44% Aysgarth, and 33% Malham), while at Reeth, only 13% had used a google search and 46% of Reeth respondents had not used anything to plan their visit (compared to only 2% at Malham and 13% at Aysgarth). This is a reflection of the number of repeat visitors to Reeth, and first time visitors at Malham and Aysgarth. Interestingly, there was no relationship between the sources of information used to plan a visit and whether visitors went into the on-site National Park centre or not.

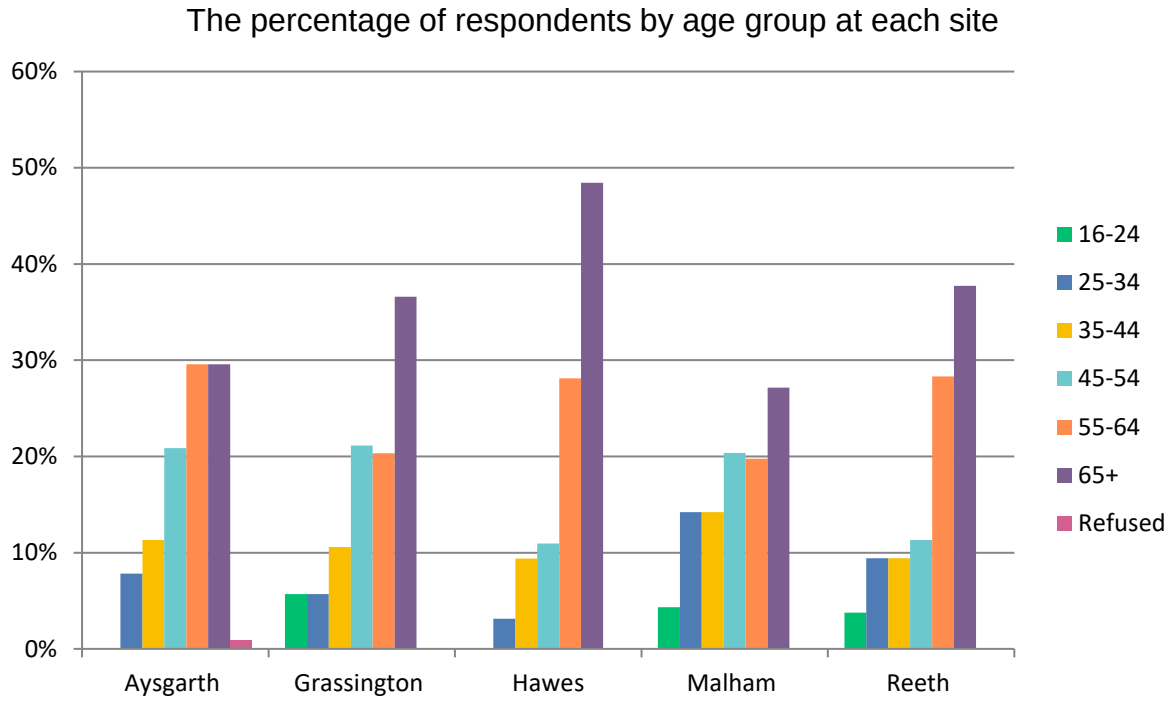
13. The National Park wide visitor survey confirms an overall downward trend in visitors use of National Park Visitor Centre's. However, there is significant variation between sites, with 87% of visitors at Aysgarth Falls going into the centre. Across all sites retail and browsing are by far the most frequent reason given for entering a National Park Visitor Centre. Few respondents (6%) went in just for information. Finally, regardless of the reason for going into the centre's, user satisfaction was very high.

14. The graph below shows the percentage of visitors, across the whole National Park, using various facilities since 2008. While there is some year on year variation - of relevance to this site specific survey - there is a decrease in numbers using car parks, national park visitor centres and leaflets, over time.



Characteristics of visitors to the honeypot sites

15. There is a big difference in visitor demographics in relation to age profile and ethnicity across the five sites. Malham has by far the youngest visitor profile, with one in three (33%) 44 years old or less, compared to around one in five visitors at Grassington (22%), Reeth (23%), and Aysgarth Falls (19%), and only one in eight at Hawes (13%). Not surprisingly the trend is reversed when looking at visitors over the age of 65, with just over a quarter of visitors at Malham (27%) and Aysgarth Falls (30%) compared to 37% at Grassington, 38% at Reeth and nearly half (48%) of visitors at Hawes.

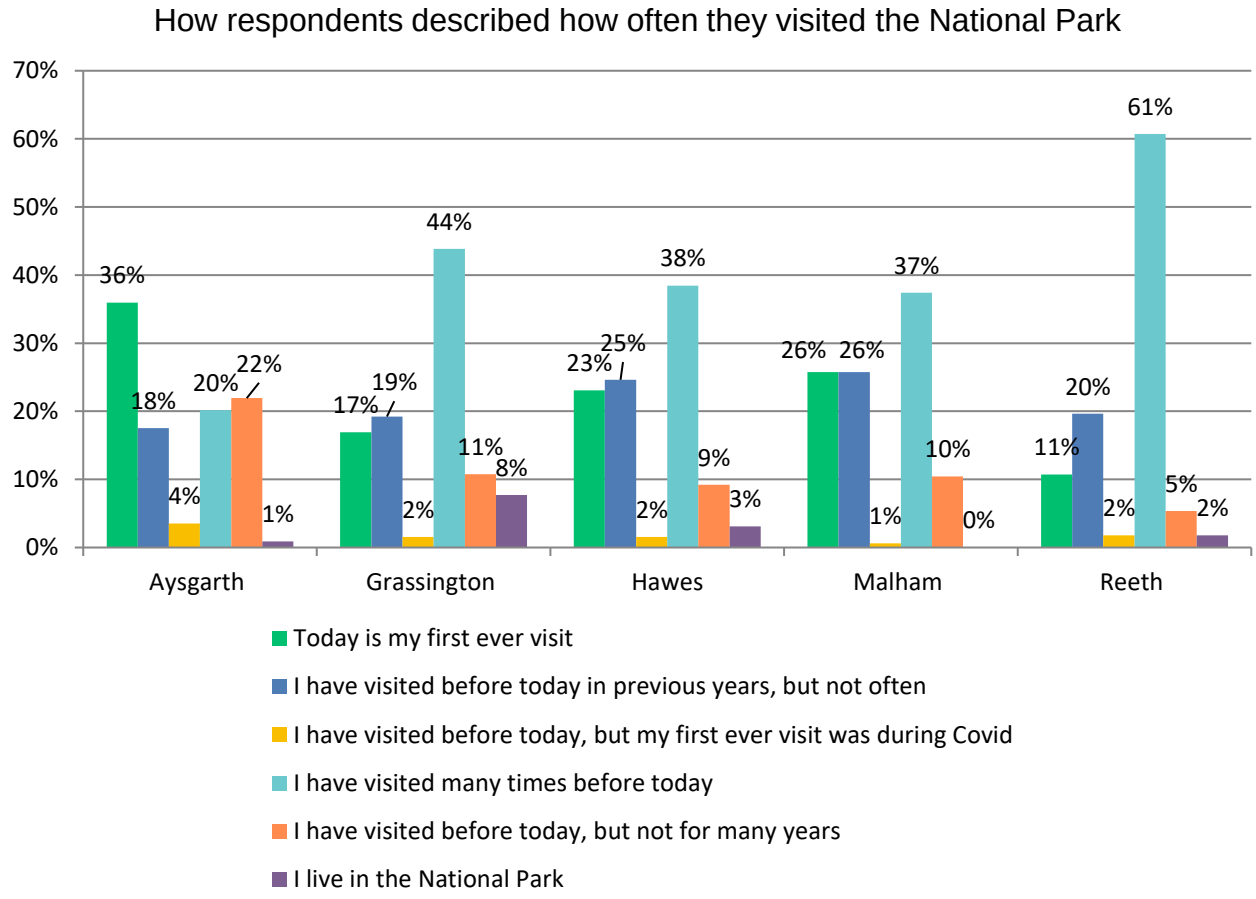


16. Malham also has the most ethnically diverse visitor profile of the five sites, with just under 1 in 10 visitors from a Black, Asian or ethnic minority group - a profile similar to the population as a whole. Hawes DCM has the least diverse profile.

Table 1: Ethnicity of respondents by site

	White British/ Irish or any other white background	Asian or Asian British/ and any other Asian background	Mixed/ white and black Caribbean/ African/ any other mixed background	Black or Black British/ Caribbean/ African/ any other black background	Chinese or other ethnic Chinese group	Other	Refused
Aysgarth	97.4%	-	0.9%	-	-	1.8%	-
Grassington	96.7%	2.5%	-	-	-	0.8%	-
Hawes	100.0%	-	-	-	-	-	-
Malham	**90.7%**	**6.8%**	**0.6%**	**-**	**1.2%**	**-**	**0.6%**
Reeth	98.1%	1.9%	-	-	-	-	-
All sites	95.5%	2.9%	0.4%	-	0.4%	0.6%	0.2%

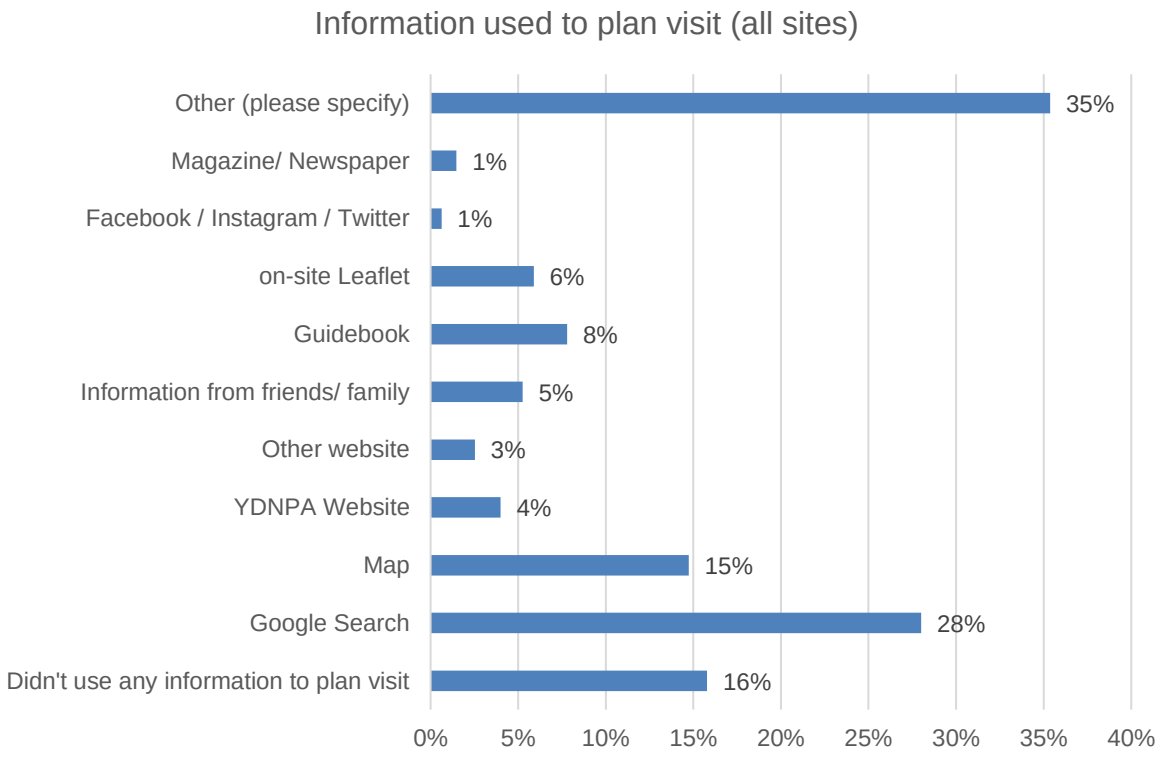
17. The five sites also had a lot of variation in the percentage of first time visitors, regular visitors and residents. The pattern identified in 2020 during the pandemic is still evident with Aysgarth (36%) having the most first time visitors at just over a third, followed by a quarter at Malham (26%) and Hawes DCM (23%). Over half the respondents at Reeth (61%) were regular repeat visitors, with Grassington (44%), Hawes (38%), Malham (37%) and Aysgarth only 20%. While one in twelve respondents at Grassington (8%) were actually a resident of the National Park.



Information used to plan their visit

18. Visitors used different information sources to plan their visit depending on the site. At Aysgarth and Malham respondents had most frequently used a google search (44% Aysgarth, and 33% Malham), while at Reeth, only 13% had used a google search and 46% of Reeth respondents had not used anything to plan their visit (compared to only 2% at Malham and 13% at Aysgarth). This is a reflection of the number of repeat visitors to Reeth, and first time visitors at Malham and Aysgarth.

19. Answers given, such as use of the YDNPA website, information from family and friends or a guidebook, were given by a similar proportion of respondents across all sites. Other answers specified were 'previous knowledge' 'been before' and 'app'.



Why did respondents choose to come to this particular site today?

20. This was an 'open' question (**Table 2**) with respondents able to give more than one reason. It was also unprompted so they could say the first thing that came into their mind. Many answers were common to all sites (walking, general sightseeing, staying nearby, been before/favourite place) while some answers were specific to the site e.g., waterfall's (Aysgarth), limestone attractions (Malham), 'All Creatures Great and Small' (Grassington), 'shopping attractions' (Hawes and Grassington) and recreation activity (Reeth). While the reasons 'recommended' or 'meet up with family and friends' were mostly given at Malham.

21. The most frequent answer given by visitors form a BAME background was the 'landscape' mentioned by 30%, followed by 'recommended' mentioned by 13%, with general sightseeing, not been before or staying nearby each mentioned by just under 10%.

22. In general, the reason given did not depend on the age of the respondent, with the exception of 'coach tour', only mentioned by respondents aged 65+ and 'exhibition/museum' and 'saw advertised' only mentioned by those aged 55+.

Table 2: Why did respondents choose to come to this particular site today?

	Aysgarth	Grassington	Hawes	Malham	Reeth	All sites
Walking	19%	25%	22%	23%	25%	22%
General sightseeing	16%	16%	14%	10%	13%	13%
Staying nearby	16%	10%	11%	8%	20%	12%
Been before/ Favourite place	7%	5%	14%	12%	5%	9%
Shopping / attractions	-	10%	29%	3%	4%	8%
Landscape	7%	5%	9%	10%	7%	8%
Recommended	7%	5%	2%	10%	2%	6%
Friends/Family meet	3%	4%	3%	7%	5%	5%
Waterfalls	18%	1%	5%	3%	-	5%
Passing by / enroute	14%	2%	6%	-	9%	5%
Seen on TV / Film	-	9%	2%	4%	-	4%
Recreational activity (not walking/cycling)	3%	4%	-	5%	15%	4%
Limestone attractions	-	-	-	11%	-	3%
Not been before	1%	-	6%	7%	-	3%
Found online	7%	-	2%	-	-	2%
Cycling	-	2%	5%	-	5%	2%
Parking	-	3%	6%	1%	-	2%
Peace and tranquillity	1%	1%	-	1%	4%	1%
Exhibition / museum	-	-	6%	-	2%	1%
Coach tour	-	2%	3%	-	-	1%
Coast to Coast	-	-	-	-	5%	1%
Dog friendly	3%	1%	-	1%	-	1%
Toilets	-	3%	2%	1%	-	1%
Wildlife	-	1%	2%	1%	-	1%
Saw advertised	2%	1%	2%	1%	-	1%
Don't know	-	1%	-	1%	-	1%

23. Respondents were asked what they had enjoyed about their visit, again this was an open, unprompted question. The scenery/landscape was the most frequent aspect enjoyed by all visitors at all sites. However, there was significant variation, with only 40% giving this answer at Grassington compared to 68% at both Reeth and Aysgarth.

24. Other answers were more site specific and included local facilities/village cited at Hawes (35%) and Grassington (28%), 11% saying being by water at Aysgarth, 21% good walking at Malham, 11% peace and tranquillity at Reeth, 6% clean pollution free at Grassington, and wildlife 6% at Aysgarth and 2% archaeology/built heritage at Hawes.

Services used

25. Respondents were asked about the on-site services they had used during their visit. These included:

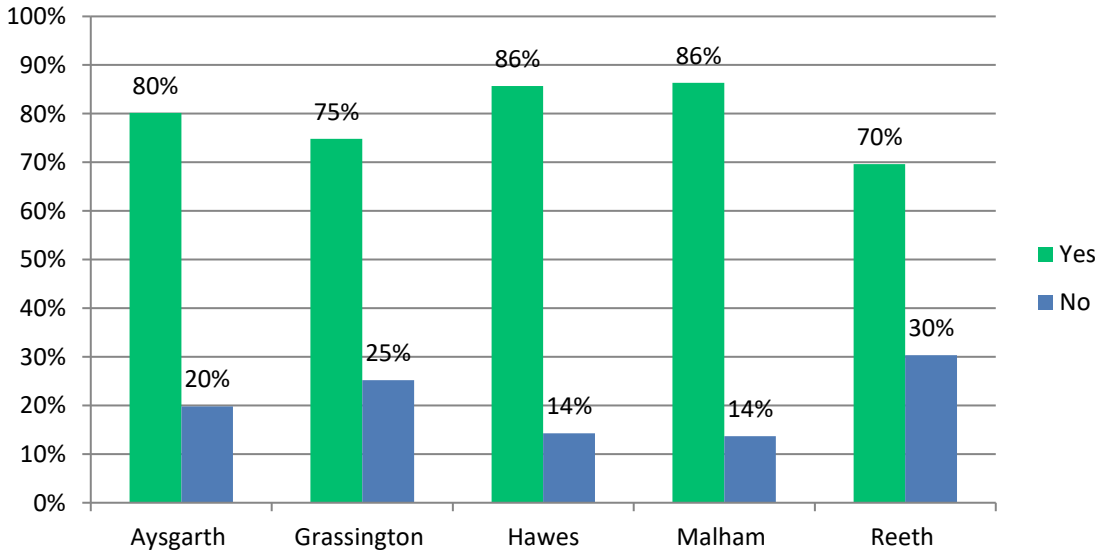
- Car park
- Toilets
- Information board and leaflets
- Way marked walk from site
- National Park Visitor Centres
- Picnic site
- Public transport

Car Park

26. All locations have several car parks in the vicinity and visitors were asked if they had used the car park where they were being interviewed. Visitors to Hawes DCM and Malham were most likely to have used the car park where they were interviewed. Reeth has a parking area around the village green rather than a formal car park and this may account for the difference at this site.

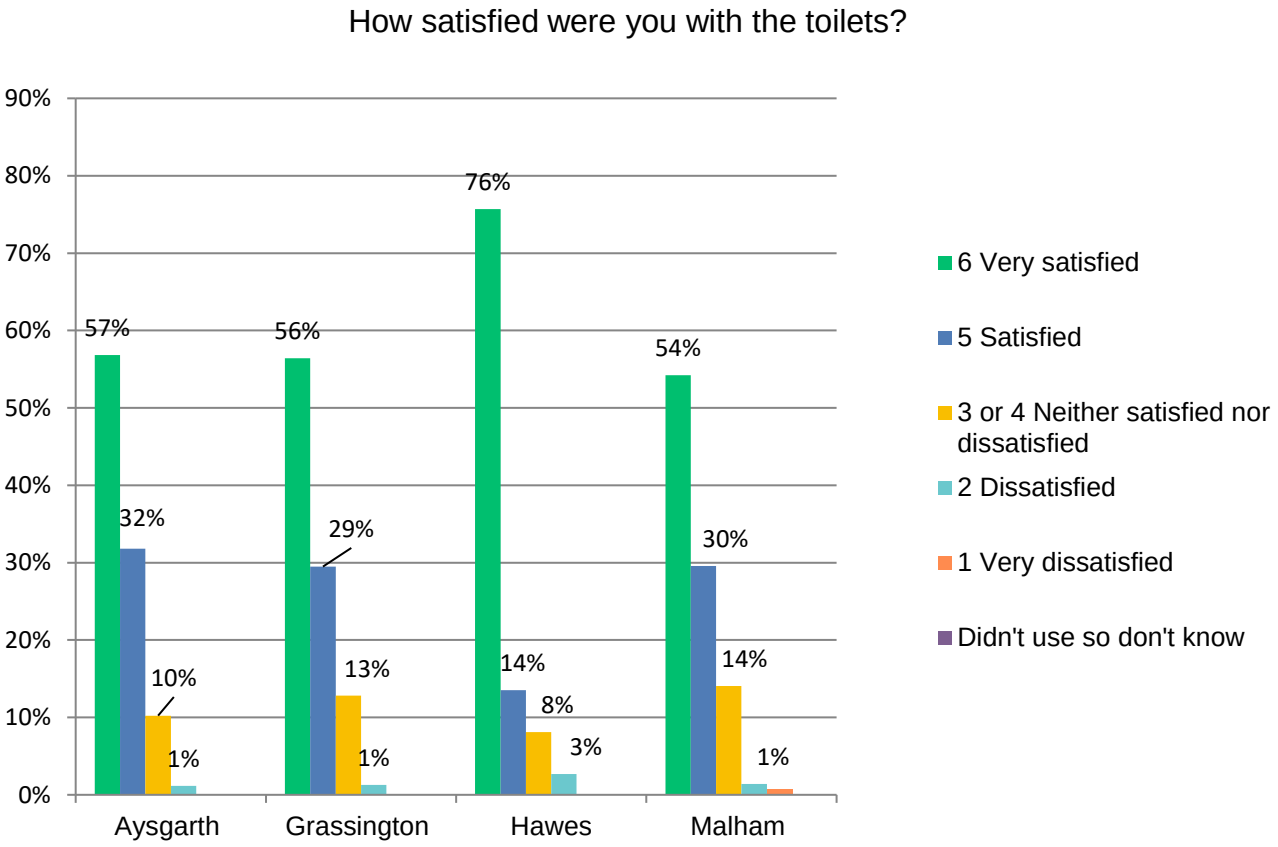
27. Satisfaction levels were particularly high at Reeth (97%) and Hawes DCM (94%) with most visitors who had used the car park saying they were very satisfied. This compares to two thirds of visitors using the car park at Aysgarth and Malham (67% and 66%) and only 59% of visitors at Grassington giving the car park this rating. Aysgarth, Malham and Grassington are the busiest car parks, and this could account for the difference. That said, only 7 respondents (out of all 392 visitors who said they had used the car park) were dissatisfied or very dissatisfied with the car park.

Whether respondents had used the car park



Toilets

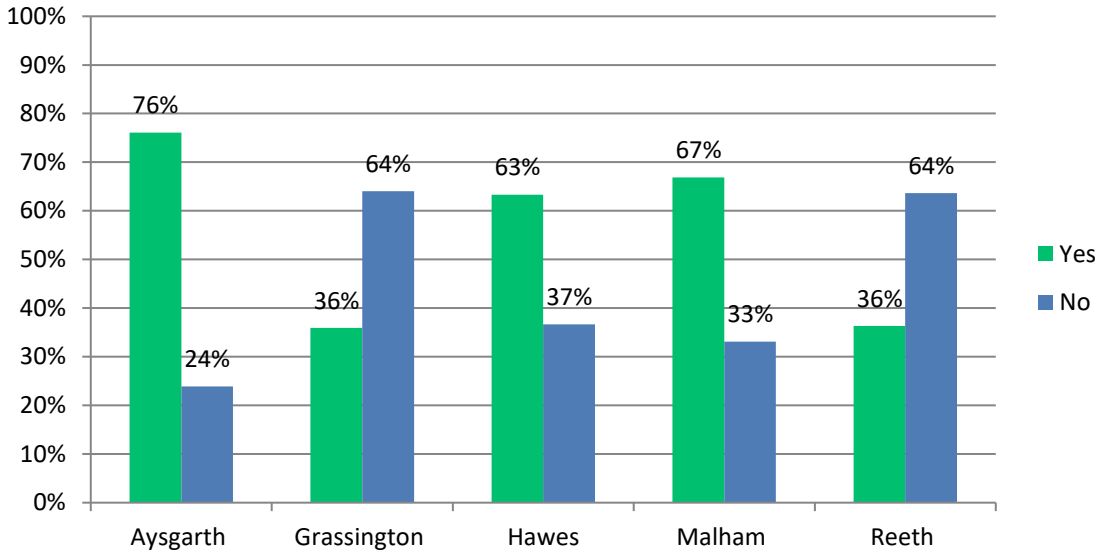
28. Satisfaction with the toilets was very high across all sites, with most respondents using them during their visit as shown by the graph below. Comments most often made included ‘clean’ and ‘tidy’, though inevitably there were a few complaints like ‘busy could have been cleaner’ - a reflection of the bank holiday period.



On-site information boards leaflets and waymarked walk

29. To help the many new visitors during Covid, we installed ‘on-site’ information boards showing a map of the area to help visitors orientate themselves, as well as a way marked colour-coded easy to follow that also indicates facilities in the area. These boards are particularly useful in helping visitors orientate themselves at the site when the visitor centres are shut. (NB at the time of this survey the visitor centres were not shut). A free leaflet was also available on-site showing how to follow the way marked walk with key countryside code style behaviour messages, for example no barbecues, taking care around water.

Whether respondents had used the on-site information board



30. Whether respondents had used the boards or leaflets varied between sites. Over three quarters (76%) of all visitors at Aysgarth Falls car park, and nearly two thirds of visitors at Malham car park had used the on-site information board. The reasons for this variance is unclear and may simply be down to site familiarity. There was no difference between a respondents age and/or ethnicity as to whether they had used the information boards.

31. Over 93% of visitors, across all sites, who had used the on-site information board were satisfied or very satisfied with their experience. Only 1 respondent out of 257 visitors who had used the on-site information board was dissatisfied.

32. The proportion of visitors using the free leaflet which included the way marked walk also varied across sites (Aysgarth 30%, Grassington 16% Hawes 32%, and Malham 21%). Again, amongst those who had used the leaflet, satisfaction levels were high with at least 85% satisfied or very satisfied with their experience across all sites.

33. Across all sites 58% of respondents had followed the waymarked walk, with 79% of users were satisfied or very satisfied with their experience. 80% of visitors to Aysgarth had followed the way mark walk compared to 73% at Malham, 48% Grassington and 38% at Hawes. This correlates with table 2, and why visitors choose to visit the sites.

National Park Visitor Centres

34. Overall, 58% of visitors surveyed across all 5 sites went into the National Park Visitor Centre or in the case of Reeth, the Community Centre, that day. In total 87% of visitors interviewed at Aysgarth and 75% at Hawes, went into the National Park Visitor Centre. This compares with 40%, 36% and 34% of visitors interviewed at Grassington, Malham and Reeth respectively.

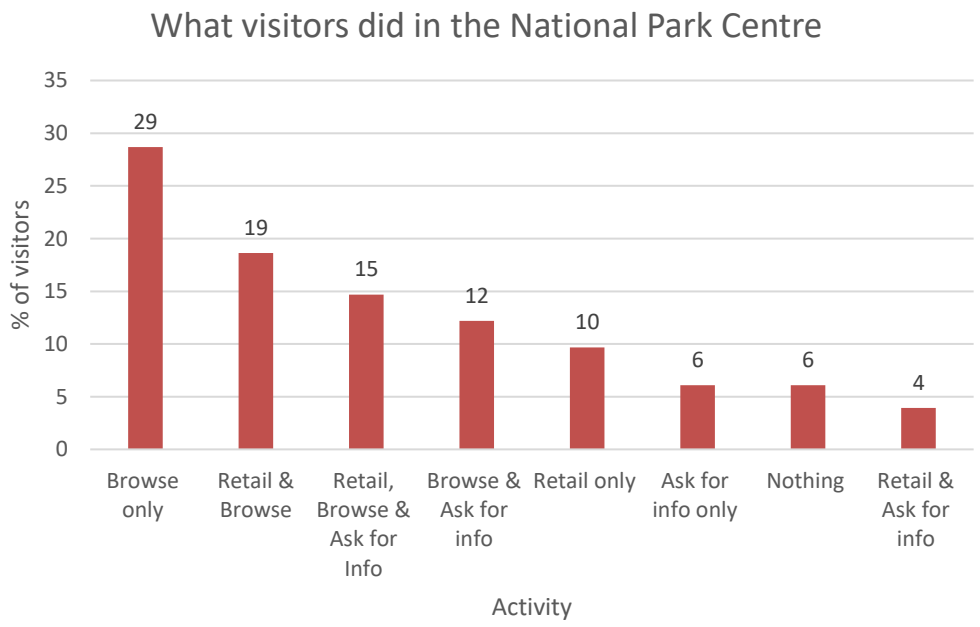
35. Looking at possible reasons for these differences (demographic profile of visitors, how often visited etc) shows that of respondents who had used a visitor centre (across all hub sites) two thirds (66%) of users were over the age of 55, with 40% aged 65+. Less than 1 in 3 visitors under the age of 35 had used a National Park Visitor Centre. Only a third of BAME visitors had used the visitor centre, compared to a half of those from other backgrounds. However, it's unclear how much of this is down to age rather than ethnicity, as nearly three quarters (73%) of visitors from BAME backgrounds were under 45 years old.

36. Amongst first time visitors in general, just over a third (68%) had used the visitor centre. This compares to 42% of those who regularly visit the National Park. There is a large variation between sites.

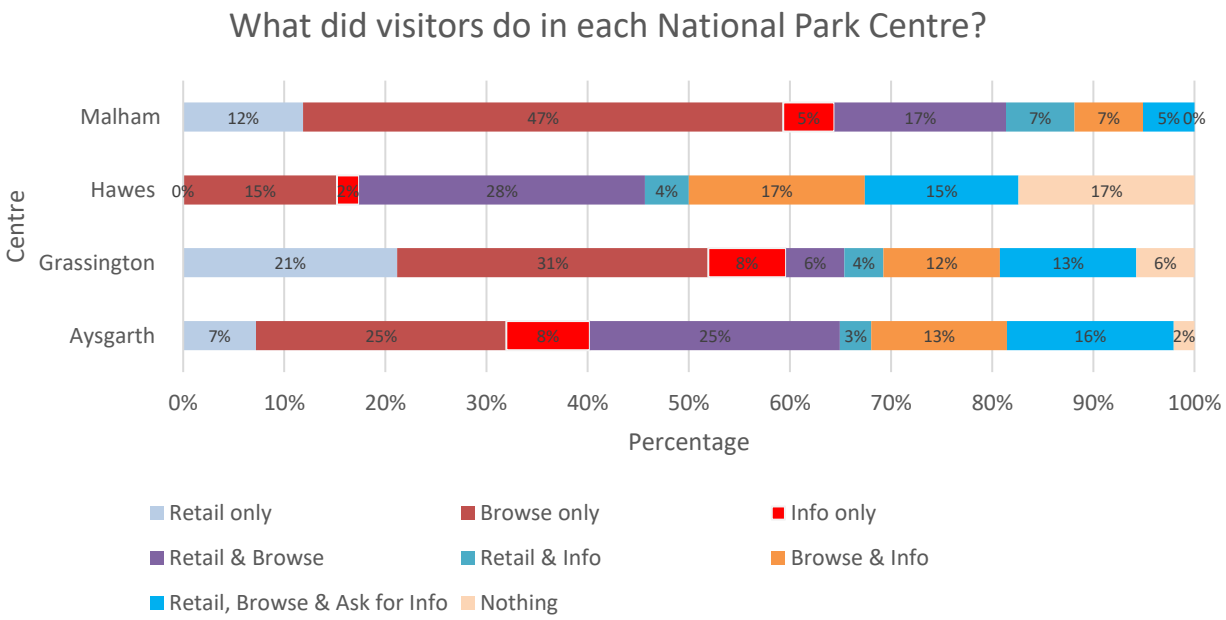
37. Interestingly, there is no relationship between the sources of information used to plan a visit and whether visitors went into the on-site National Park Visitor Centre or not. For example, a similar proportion of visitors who went into a National Park Visitor Centre had used a google search (30%) as those who choose not to go in a National Park Centre (25%), 16% hadn't used any information to plan their visit compared with 17%, 15% using a map and going into the National Park Visitor Centre compared with 14% using a map and not going into a visitor centres, information from family and friends both 5%.

How are visitors using the National Park Visitor Centres?

38. The graph below shows what people did once they were into the visitor centre: 29% of visitors went in and browsed only, 6% of visitors went in just to ask for information, 10% went in solely for retail.



39. The information above has been broken down by visitor centre to see how the pattern differs between sites. Note that we did not look at the Reeth figures. The total number of visitors who went into Hudson House was only 18 therefore the sample size was too small.



40. Across all sites retail and browsing are by the most frequent reason that visitors entered a National Park Visitor Centre. Few respondents went in just for information. User satisfaction was very high as shown in the table below:

Table 3: Level of satisfaction with the National Park Visitor Centre

	6 Very satisfied	5 Satisfied	3 or 4 Neither satisfied nor dissatisfied	2 Dissatisfied	1 Very dissatisfied
Aysgarth	64%	36%	-	-	-
Grassington	54%	38%	8%	-	-
Hawes	100%	-	-	-	-
Malham	82%	11%	7%	-	-
Reeth	100%	-	-	-	-
All centres	72%	23%	6%	-	-

41. There was no relationship between what respondents had enjoyed at the site, and whether they had gone into a National Park Visitor Centre.

Other facilities

42. Visitors were also asked about their use of picnic sites and public transport. The sample size was small. For public transport, 14 people (2.7%) used public transport with most people saying there were satisfied with the service. Nobody said they were dissatisfied.

43. For picnic sites, 58 people (11.1%) had used this facility and most people said they were very satisfied or satisfied with the service. Only 2 respondents indicated they were very dissatisfied with the facility. These were at Grassington and one related to the lack of litter bins.

Table 4: Level of satisfaction with picnic site

	6 Very satisfied	5 Satisfied	3 or 4 Neither satisfied nor dissatisfied	2 Dissatisfied	1 Very dissatisfied
Aysgarth	43%	50%	7%	-	-
Grassington	50%	39%	6%	-	6%
Hawes	33%	-	67%	-	-
Malham	53%	27%	20%	-	-
Reeth	100%	-	-	-	-
Total	50%	35%	13%	-	2%

Conclusion

44. This survey has provided feedback on five visitor honeypots, and our four hub sites at Aysgarth, Grassington, Hawes and Malham. It shows the differences in visitor profile at these sites, and motivation for visiting. Satisfaction with facilities are high at all sites.

Appendix 1

National Park Centre / Visitor Hub Survey 2022

Name of interviewer:		**Date:**	
Location:		**Time:**	

1. How many adults (over 18) and children are in your group today? …….. adults …….. children

2. Where do you live? [*first four digits of postcode]*

3. How would you describe how often you visit the Yorkshire Dales National Park? *[ask them to describe and then select appropriate option yourself]*

Today is my first ever visit		I have visited before today in previous years, but not often	
I have visited before today, but my first ever visit was during Covid		I have visited many times before today	
I have visited before today, but not for many years		I live in the National Park	

4. Why did you choose to come to this particular site today?

5. During your visit to <u>THIS SITE</u> have you used any of the following facilities or services? [*Tick if they didn't use facility or; if used facility; circle a number to indicate rating]*

Service / facility	Used?		Not at all satisfied ↔ Satisfied					
	Yes	No	1	2	3	4	5	6
Toilets								
Car Park								
Information boards								
Public transport								
Picnic site								
National Park leaflets								
Waymarked walk from site								
National Park Centre (*if yes complete three below)*								
- **Ask for information**								
- **Look around / browse**								
- **Retail purchase made**								

5. cont'd. Ask for reasons for particularly high or low scores in previous question

6. What information did you refer to plan your visit before you came to this site?

7. What have you enjoyed about your visit today?

8. **Any other comments about your visit to this site today?**

Demographics *[ask if they mind answering]*

9. Which age group do you belong to? (*tick one box only*)

1) 16 – 24 years ☐ 4) 45 – 54 years ☐
2) 25 – 34 years ☐ 5) 55 – 64 years ☐
3) 35 – 44 years ☐ 6) 65 + years ☐
7) Refused ☐

10. To which ethnic group do you consider yourself to belong?

1) White/British/Irish or any other white background ☐
2) Mixed/ white and black Caribbean/ white and black African/ any other mixed background ☐
3) Asian or Asian British/ Indian Pakistani/ Bangladeshi/ any other Asian background ☐
4) Black or Black British/ Caribbean/ African/ any other black background ☐
5) Chinese or other ethnic Chinese group ☐
6) Other (please specify) …… ☐
7) Refused ☐

11. Do you consider yourself to have a disability or long term illness that affects your health?

Yes ☐ No ☐

12. How would you describe your gender? [*Do not prompt]*

Male ☐ Female ☐ Other/non-binary ☐ Prefer not to say ☐

THANK YOU FOR YOUR TIME