

**HOWARDIAN HILLS
AREA OF OUTSTANDING NATURAL BEAUTY
JOINT ADVISORY COMMITTEE
5 NOVEMBER 2012**

VISITORS & USERS SURVEY

1.0 PURPOSE OF REPORT

- 1.1 To receive details of the methodology and results of the Visitors & Users Survey that was carried out in August.

2.0 VISITORS AND USERS SURVEY

- 2.1 Objective AP1.6 of the AONB Management Plan states that the Joint Advisory Committee will carry out a follow-up Visitors & Users Survey, to assess the impact of the JAC's awareness-raising initiatives. This was categorised as a Priority 1 task, to be completed in Years 2 and 5 of the 2009-14 Management Plan (i.e. in 2010/11 and 2013/14).
- 2.2 Rather than split the re-survey into two parts, and because of pressure of other work in the early part of 2010/11, it was agreed by the JAC Chairman at the time that the survey should instead be carried out in 2012/13. This would make it 10 years after the first survey, which was carried out in summer/autumn 2002. Summer 2012 would also be in the correct time frame to feed into the next review of the AONB Management Plan.

3.0 METHODOLOGY

- 3.1 The 2002 Visitors & Users Survey consisted of a number of pieces of work and was carried out by consultants. Work included: an audit of the number of tourist and leisure facilities in the AONB; a review of existing survey data from Castle Howard, Ryedale and Hambleton DCs, etc; and a questionnaire.
- 3.2 The information was obtained in a number of ways, including a desk study, site visits, consultation with key individuals, a visitor survey, a focus group with tourism providers and telephone interviews with special interest users.
- 3.3 In developing the methodology for the 2012 survey, the AONB Team felt that knowledge of the tourism situation in the AONB had increased significantly since 2002. As a consequence, it was felt that the work needed in 2012 did not need to be a full repeat of 2002. The principal information that it was felt could be gathered was how many people visited the quieter parts of the AONB for informal recreation, where they came from and what activities they took part in. This would give an indication of what pressure some parts of the AONB were under, and what (if any) actions could/should be included in the next AONB Management Plan.

- 3.4 The 2012 survey therefore consisted solely of counting vehicles at the smaller informal parking areas and conducting surveys with people at specified locations.
- 3.5 It had been hoped that the survey could have been run, managed and analysed by the AONB Team, using volunteers to carry out the surveys. It was recognised however that if Francesca Pert moved to a new job before Liz Bassindale returned from Maternity Leave, then either consultants would need to be employed at short notice or the survey would need to be shelved again.
- 3.6 As it transpired, Francesca did move to a new job so the consultants who carried out the 2002 survey were approached to see if they could undertake the work within the extremely short timescale needed. Volunteer surveyors were still built into the methodology, but as the surveys were scheduled for the end of the summer holidays none were available. The whole survey was commissioned, designed and implemented within a 6 week period from early August to early September.
- 3.7 Vehicle counts – Two routes were devised and driven on an hourly basis between 08.00 and 20.00 on two chosen days (a Sunday and a week-day). The number of vehicles and people present at the 14 car parks/laybys were recorded. The locations were the same car parks/laybys as have been covered by an annual count undertaken by AONB staff in late August in previous years:
- Newburgh Priory Lake
 - Pond Head, Oulston
 - Windy Gates, Yearsley
 - Yearsley Mast
 - Grimston Junction
 - Grimston Moor
 - Dalby Maze
 - Nunnington Sawmill
 - Caulkleys Bank, Nunnington
 - Sheep Walk, Castle Howard
 - Bell Bottom Wood, nr Terrington
 - Fisherman's Car Park
 - Howsham Bridge
 - Kirkham Priory Car Park
- 3.8 Questionnaire – Questions used in the 2002 survey were reviewed and adapted to take account of changed circumstances. A sampling plan was then developed, which was designed to obtain data from visitors at a variety of sites and at various times of the day – morning, mid-day, afternoon and early evening. It also acted as a presence/absence survey. The survey sites were:
- Hovingham Bakery
 - Fishermans' Car Park (Castle Howard Lake)
 - Kirkham Priory
 - Pattacakes Bakery, Welburn
 - Caulkleys Bank
 - Newburgh Priory
 - Windy Gates (Yearsley/Gilling Woods)
 - Centenary Way (Appleton-le-Street, Fryton)

- 3.9 In total, 192 questionnaires were completed. 180 interviews were completed with visitors in the AONB and 12 questionnaires were completed on-line as a result of a post card distribution. This does not constitute a statistically robust sample size, so the results should be treated with caution. However, given the structure of the sample, the number of interviews is sufficient to identify significant trends in the results.

4.0 RESULTS

- 4.1 The key findings of the 2002 research, which it must be remembered used different survey locations and a different set of questions, were as follows:

- 63% of visitors were on a day trip from home and 37% were staying
- A fifth of the staying visitors were using accommodation within the AONB; most of the remainder were staying elsewhere in Ryedale, in York or in Scarborough Districts
- The average length of stay was 4.41 nights
- Visits were relatively evenly distributed through the year with a June to November 'high season'
- Most came to visit a particular attraction or place (most commonly Castle Howard or Nunnington), for a drive in the country or for a walk
- Economic impact was significant; visitors spent on average £15.39 per person. Residents spent the least (£4.94) and staying visitors spent the most (£40.42) – day visitors spent £10.01
- The landscape, peace and tranquillity, lack of traffic, easy accessibility and attractive villages were what brought people to the AONB
- Awareness of the AONB was low, with only 23% of respondents able to identify it correctly as the Howardian Hills AONB

- 4.2 In comparing the 2012 results with the 2002 survey, it has been possible to draw the following conclusions:

- The age profile has remained the same; under 16 year-olds continue to be under-represented amongst visitors to the AONB
- The type of trip has not changed, with most visitors coming on day trips followed by holiday/Visiting Friends and Relatives trips and residents making up in the region of 20% of trips
- Higher proportions of people interviewed in 2012 had stayed in self-catering and camping/caravan accommodation. However, this could be down to sampling differences; also, the 2002 survey took place over a longer period of shoulder and low season, which is likely to show a higher proportion of stays in serviced accommodation
- Length of stay for tourists was 4.4 nights in 2002 and 6 nights in 2012. Again, this is likely to be a reflection of the survey period
- Party composition was similar, with 2 adults being the most common in both surveys
- There were slightly more first time visits in 2012. This is likely to be a result of the survey period
- Frequency of visit was similar in both surveys
- The summer period was the most common for visits in both surveys

- Fewer people in the 2012 survey were visiting an attraction, and walking with a dog was significantly more common. This difference is likely to be a result of the locations chosen for conducting interviews in the two surveys
 - The proportion of people aware that they were in the Howardian Hills and that it was nationally designated as an AONB increased significantly from 23% in 2002 to 68% in 2012, partly because of the AONB threshold road signs
- 4.3 Charts showing the survey results in more detail are displayed on boards within the room.
- 4.4 The survey is felt to have been a worthwhile exercise and one that ought to be repeated on a similar timescale in future, i.e. every 10 years (unless significant changes are felt to be occurring in the meantime).
- The information gathered has confirmed the general impression that the AONB continues to be under relatively little recreation pressure
 - People continue to visit for the same reasons that they always have – for quiet tranquillity in a fairly ‘hidden’ part of the English countryside
 - Some small nuggets of information have emerged that may indicate the need for future management works in specific locations or for certain user groups. In particular the number of mountain bikers using Yearsley/Gilling woods (and creating tracks that can damage features of conservation interest), and the lack of information about where disabled users or people with children in buggies can park and walk easily. These issues can be addressed in the next version of the Management Plan

5.0 RECOMMENDATION

It is recommended that the Visitors & Users Survey methodology and results be noted for information.