

# Peak District National Park Visitor Survey 2014

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## Non-Visitor Survey 2014

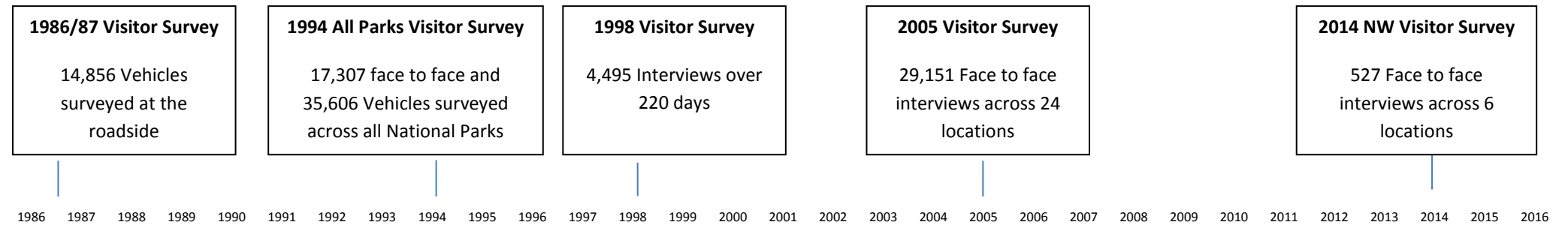


## Survey Background

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Previous visitor surveys have been undertaken in 1986/87, 1994, 1998 and 2005. Tourism surveys and visitor estimates vary in type and methodology. This latest data will complement other data on tourism and visitor volume and value. Visitor surveys remain the only method for quantifying behaviours and perceptions of visitors to the National Park.

This is the first non-visitor survey the Peak District National Park Authority (PDNPA) has undertaken. Manchester was chosen as the first location to survey, as the evidence was also required for a Heritage Lottery Funding bid. Working with Manchester City Council, increased sampling was adopted for three areas in Manchester (Beswick, Newton Heath and Clayton Vale). These areas are located in the east of Manchester and are communities with high levels of deprivation and low income households.



## Survey Purpose

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### Visitor Survey

The aim of the research was to engage with a representative sample of visitors via interviews in the North West of the Peak District National Park (PDNP) to obtain information about visitor behaviour and their perceptions.

Specific objectives of the survey were to:

- Establish trend since the last survey in 2005, where data is still useful
- Provide up to date information required for effective visitor management and visitor impact
- Implement a methodology and sample frame to replicate the survey in other areas of the PDNP

### Non-Visitor Survey

The aim of the research was to engage with a representative sample of the Greater Manchester population via interviews in Greater Manchester, including booster samples from Beswick, Newton Heath and Clayton Vale.

Specific objectives of the survey were to:

- Understand the perceptions and motivations of non-visitors
- Provide information for partnership and funding work in the area to address non-visiting and help unrepresented groups to benefit from the National Park
- Develop a baseline data set to inform any further non-visitor surveys

## Methodology

### Visitor Survey

This consisted of quantitative, face to face surveys with people who have visited the National Park, conducted by (PDNPA) staff at various locations across the National Park on five different dates between 17/05/14 and 07/08/14. Survey times were between 10am and 5pm each day. Peak and off-peak dates were chosen to maximise the opportunity of obtaining information from a variety of visitors. Site locations were chosen to include a range of sites as they attract different types of visits and visitors. Visitor Survey Locations:

Site	Grid ref	Sample	Description
Castleton	SK 149829	100	Outside the PDNPA visitor centre
Dovestones	SE 013034	102	The site access point
Hayfield	SK 048869	121	PDNPA car park and toilet block facilities
Langsett	SE 210004	105	In the car park and around Langsett Barn
Longdendale	SK 067981	92	In the PDNPA Car Park
Pennine Way	SK 089933	76	Surveys were undertaken just off the A57



The questionnaire was designed by the PDNPA and was based on previous visitor surveys where possible to ensure trend data was collected. A total of 24 questions were asked, and the interviewing was carried out by PDNPA staff. In total there were 596 responses.

### Non-visitor survey

A quantitative, face to face survey with people who have not visited the Park, was conducted by DJS interviewers at various locations across Greater Manchester between 28/06/14 and 07/08/2014. The questionnaire was designed by DJS Research, in close consultation with PDNPA staff. A total of 12 questions were asked and the interviewing was carried out by DJS. Respondents were shown a map of the PDNP and asked if they had visited any location within the National Park in the last 5 years. Screening questions were also asked for gender, age and if they were from Beswick, Newton Heath or Clayton Vale.

Site	Description
Bolton	Bolton Town Centre
Bury	The Rock Precinct
Manchester	City Centre
Oldham	Town Centre
Rochdale	Town Centre
Salford	Town Centre
Tameside	Ashton under Lyne Town Centre
Beswick	Door knocked
Newton Heath	Town Centre
Clayton Vale	Clayton Vale

The population of Greater Manchester is 2.7 million (Census 2011). The population of the wards Beswick, Clayton Vale & Newton Heath is 20,085 (Census 2011).

Site	Sample	SE ±
Beswick, Clayton Vale & Newton Heath	96	9.98%
<b>Grand Total</b>	<b>629</b>	<b>3.91%</b>

## ACORN - Results

Acorn is a powerful consumer classification model that segments the UK population. By analysing demographic data, social factors, population and consumer behaviour, it provides precise information and an understanding of different types of people. ACORN provides 5 main categories of 'consumer' which break down into 17 sub-groups and then a further 62 types. Acorn is used to understand consumers' lifestyle, behaviour and attitudes, together with the needs of communities, and it is used to analyse customers, identify profitable prospects, evaluate local markets and focus on the specific needs of each catchment and neighbourhood. The 5 main categories can be seen in the table below. With reference to the Great Britain average and Greater Manchester average for comparison with both the visitor and non-visitor surveys.

*Proportion of postcodes per ACORN Category | Visitor & Non Visitor Survey | Base 466 & 375*

	Greater Manchester	Non-Visitor	GB	Visitor Survey
Category 1 – Affluent Achievers	20%	4%	23%	33%
Category 2 – Rising Prosperity	5%	3%	9%	5%
Category 3 – Comfortable Communities	22%	10%	27%	33%
Category 4 – Financially Stretched	25%	43%	23%	18%
Category 5 – Urban Adversity	27%	37%	18%	10%
Category 6 – Not Private Households	1%	3%	1%	1%

\*ACORN GB & Greater Manchester<sup>1</sup>

### Visitors

Two thirds of visitors are 'affluent achievers' or 'comfortable communities' category. This shows that a large proportion of visitors to the Peak District National Park are from the more affluent, healthy sectors of society. These groups are overrepresented compared to society as a whole, whereas visitors that are 'financially stretched' or classed as within 'urban adversity' are underrepresented when compared to the GB average. Looking at the two categories in detail, it shows visitors to the Peak District National Park although above the national average for income and financial stability, are not the most well off sectors of society and do not lead 'lavish lifestyles'.

### Non-Visitors

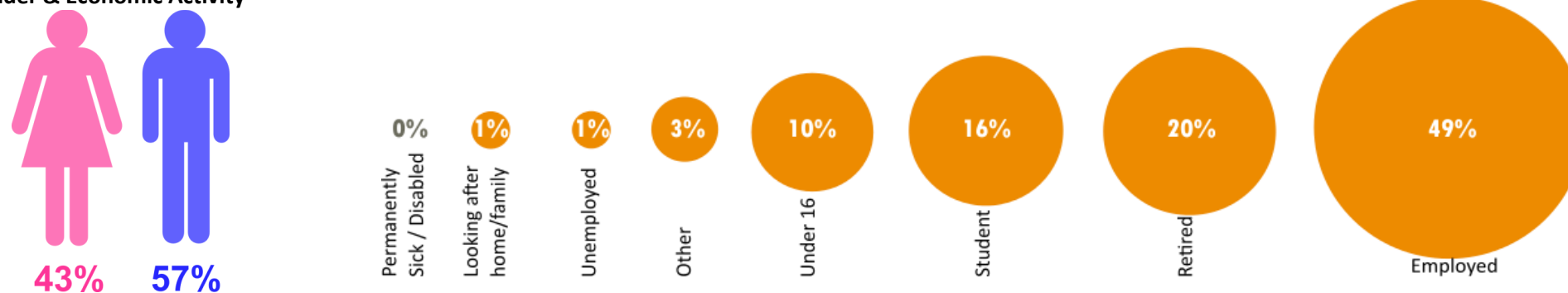
85% (or over 8/10) of non-visitors from Manchester come from the 'urban adversity' or 'financially stretched' categories. These tend to be 'singles and young families', 'young people in small, low cost terraces' and at the other extreme of this category 'poorer pensioners'. There is double the proportion of non-visitors in the 'urban adversity' category compared to that of the Greater Manchester average. Conversely, the more affluent ACORN categories such as 'Affluent Achievers' are underrepresented when compared to the Greater Manchester average.

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## Visitor Survey 2014 - Results

## Visitor Survey Results – Who Came?

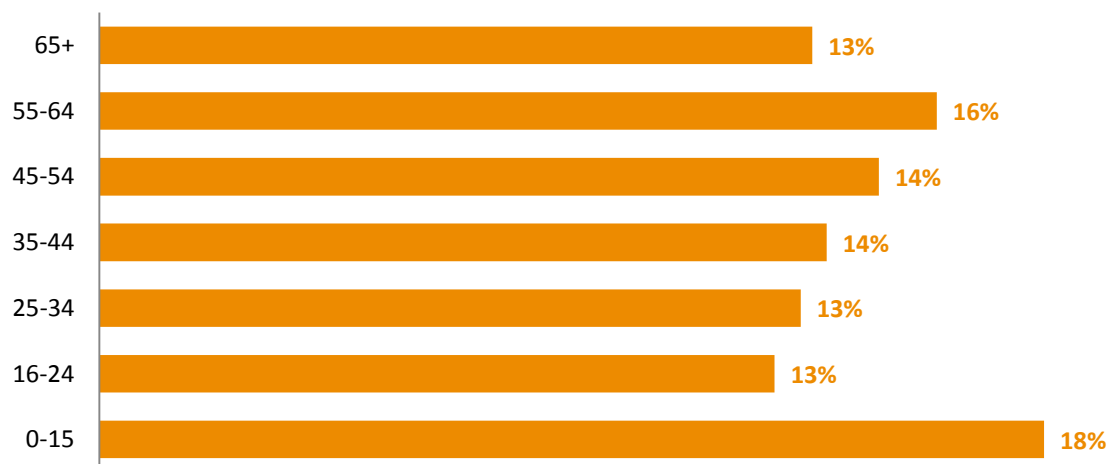
### Gender & Economic Activity



In 2005, the gender split in the PDNP was male 53% and female 47%, in the Dark Peak this was 54% male to 46% female. There was a variation in gender by site location, with the more secluded site of the Pennine Way having the greatest range in the ratio of male to female visitors.

About half of the visitors in 2014 were in employment, 22% were retired (19% in 2005) and 16% were students (15% in 2005). When compared with the national rate, the proportion of people employed (56%) is slightly higher than the proportion of visitors to the PDNP (49%). However, the proportion of retired people (12%) and students (5.8%) nationally is overrepresented in visitors. Unemployed visitors to the North West Peak District (1%) are four times less than the national unemployment rate (4%)<sup>2</sup>.

### Age

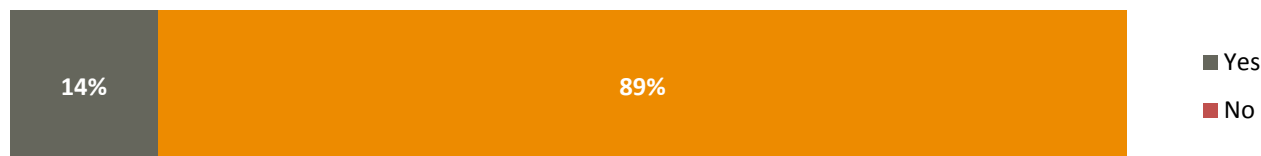


Respondents were asked their age as well as the ages of all the group members. The analysis reflects the group responses; this includes under 16 (not directly surveyed). The significant change in age range is the 16-24 year age band increasing from 6.2% in 2005 to 13% in 2014. Comparisons with the Census data (2011) show that this is more representative of the 16-24 year age group in England which was 12%. The only age groups that show difference to the national trend are the 55-64 which are overrepresented when compared to England (12%) and the 65+ age group which is underrepresented when compared to England (16%). Although the sample is robust, due to the small sample size, further analysis of data by age groups is not reliable. More reliable analysis will be possible after the 2015 survey has taken place.

<sup>2</sup> Data taken from the Census 2011 | Economic activity calculated as 16+ not working age so comparable with visitor survey

## Visitor Survey Results – Who Came?

### Limiting long term illness / disability

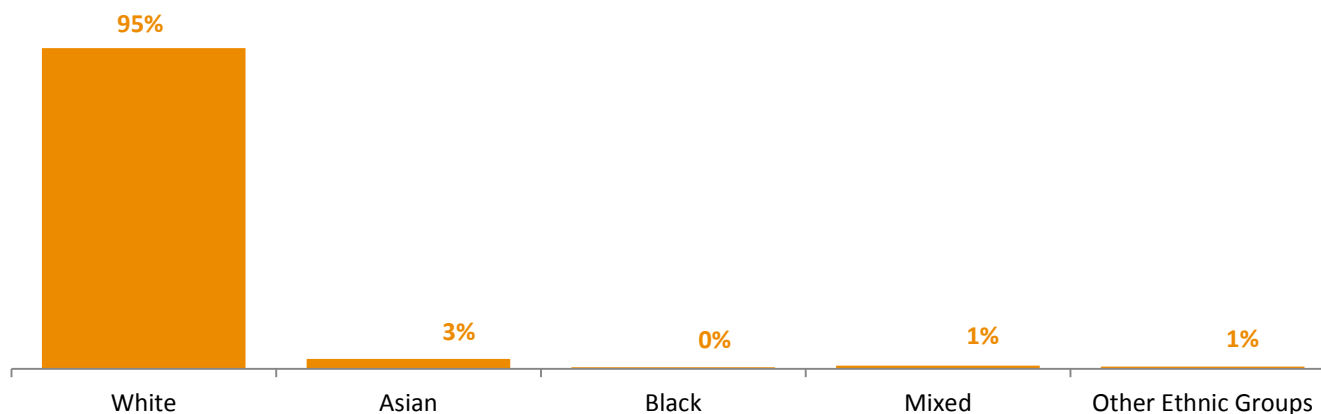


The survey question was phrased slightly differently in 2005, with 3% stating they had a mobility problem. The Census 2011 showed that in England, 17.6% of the population responded that their day-to-day activities were limited.

### Deprivation

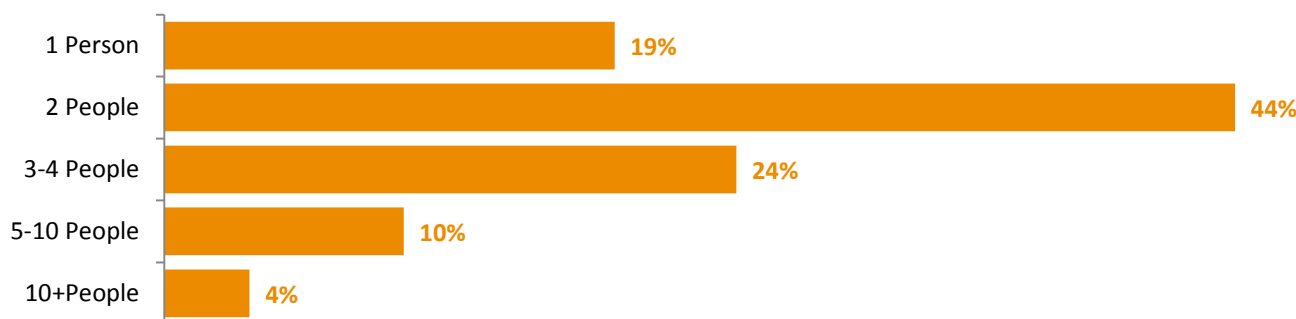
Postcodes were mapped against the Government's indices of deprivation 2010. Deprivation varied greatly amongst visitors. Some visitor postcodes were in the top 1% most deprived neighbourhoods and conversely there were postcodes from the least deprived areas in the country. On average, visitors were ranked at 55% most deprived. This means Visitors are slightly above the National average in terms of deprivation or better than average health, income, education and environment.

### Ethnicity



In 2005, 94% of visitors to the Peak District classed themselves as White British compared with 90% White British in 2014. Aggregated with White British, Irish, and White Other this figure is 95%, which is significantly higher than the National level at 85.4% (Census 2011). Other minor ethnic groups, for example, Black, Asian and mixed multiple ethnic groups, are all underrepresented. During the survey period, Dovestones attracted the largest proportion of Black Minority Ethnic Groups 11%.

### Group Size



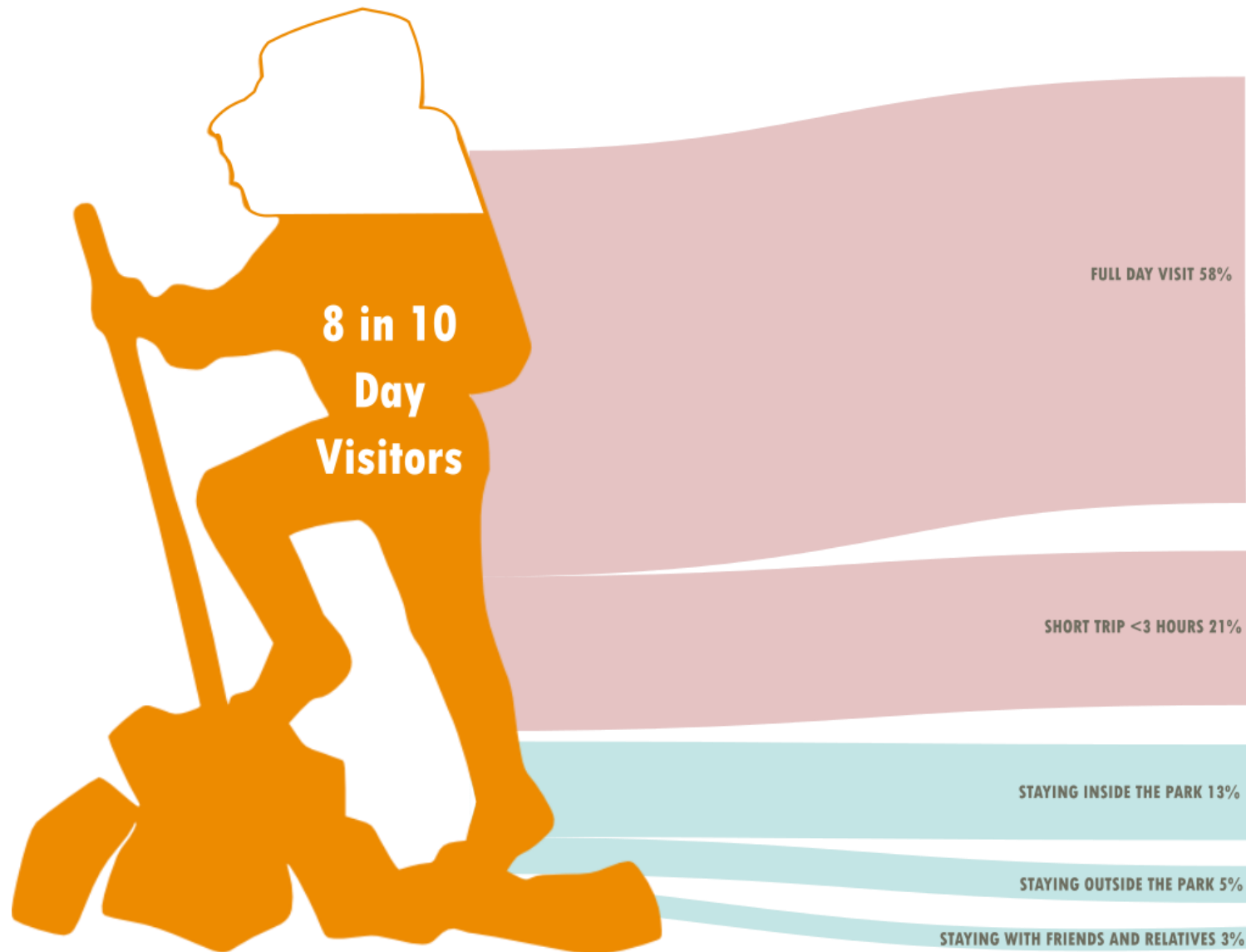
The average group size is 3.2, which is the same as in 2005. The more remote locations (Snake Pass & Longdendale) attract smaller group size.

Snake Pass attracts the largest amount of individual visitors. Out of the 19% travelling alone (111 respondents) of these 26 were Female (23%) and 85 were Male (77%).



## Visitor Survey Results – How long did they stay?

### Visit Type



79% of visitors are day visitors (*not including other*) compared with 77% in 2005. However, in 2005, the percentage of day visitors was 82% in the Dark Peak and 68% in the White Peak.

The average length of visit for those that stay overnight is 3.8 days.

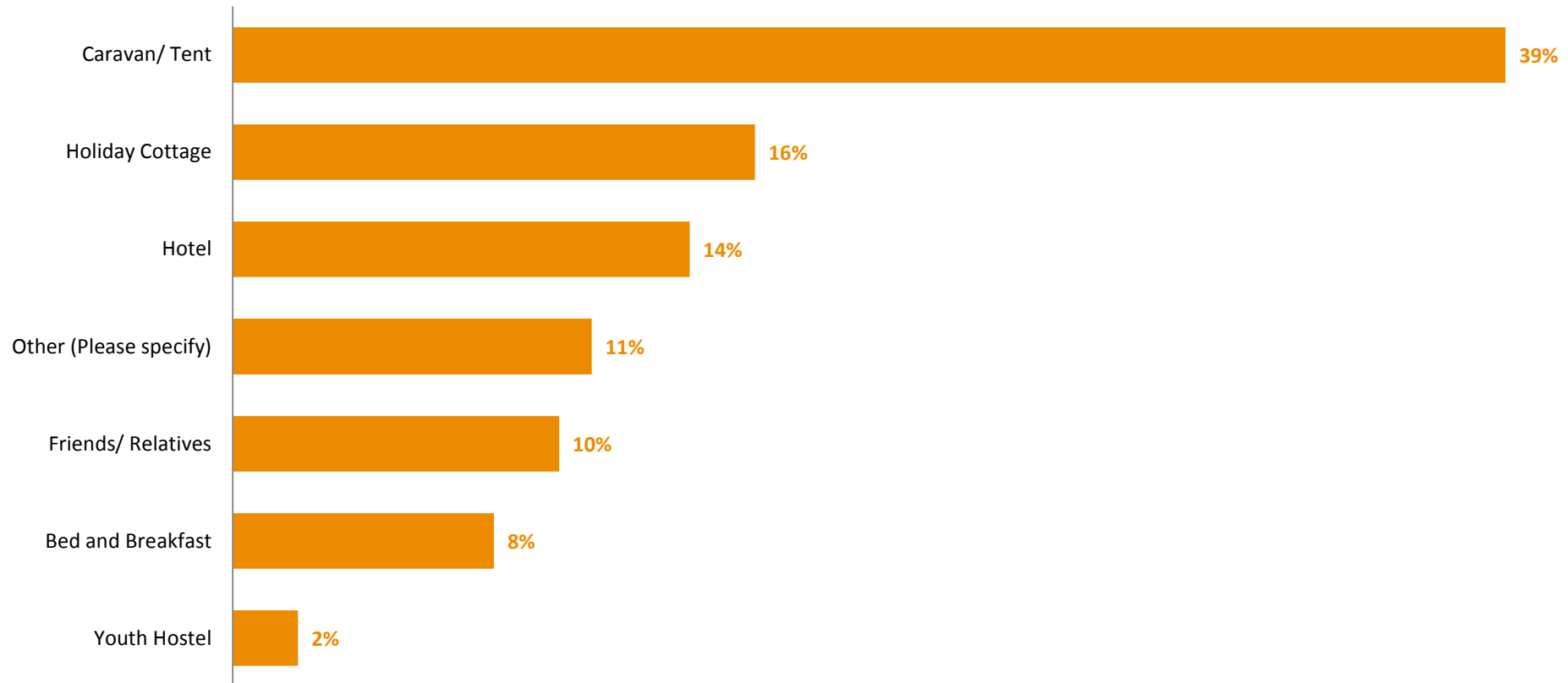
Average length of stay (hours) to the north west of the park is 3.4 hours. This compares with a Peak District average of 3.6 hours in 2005.

Overnight visitors make up 16% of the visitors, with two thirds staying inside the National Park. A further 3% of visitors are staying with friends and relatives both stay overnight and visit for the day.

## Visitor Survey Results – Where did they stay?

### Accommodation

As in 2005, Caravan and Tent was the most popular form of accommodation. Over 50% of the tourist bed stock in the Peak District National Park is Caravans, Campervans and Tents. Youth Hostels are the lowest proportion of accommodation sector. Due to the small number of staying respondents it is not possible to produce reliable data relating to the day of the week, visitor periods or area visited for visitors staying overnight.

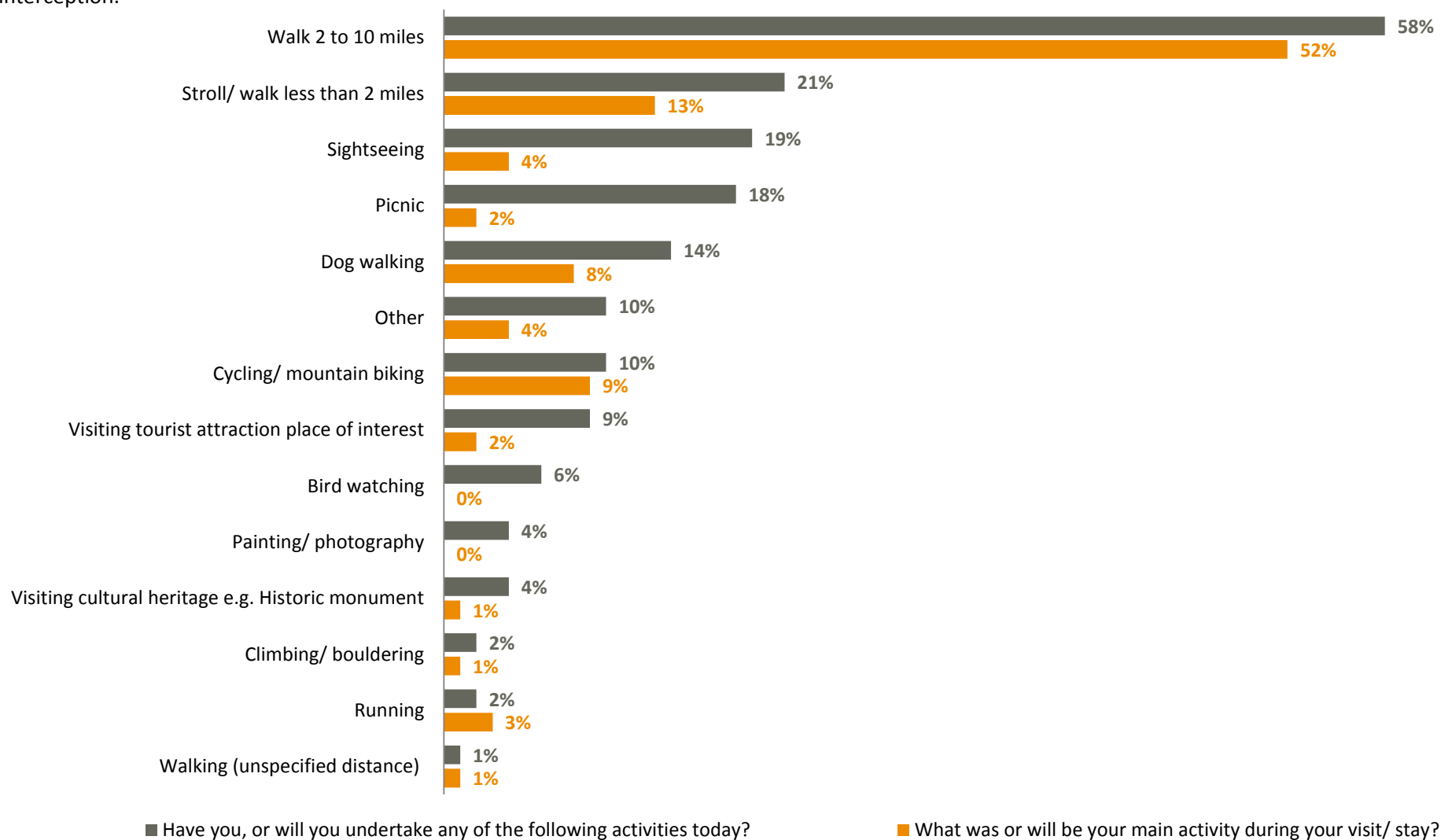




## Visitor Survey Results –What did they do?

### Activities undertaken

Half of all visitors state their main activity as walking 2-10 miles. Although it is expected that walking is the main driver for visits to the area, this may not be a representative sample of recreation levels within the whole Peak District National Park, and may be influenced by the location of the surveys and the method of interception.



## Visitor Survey Results – How did they get here?

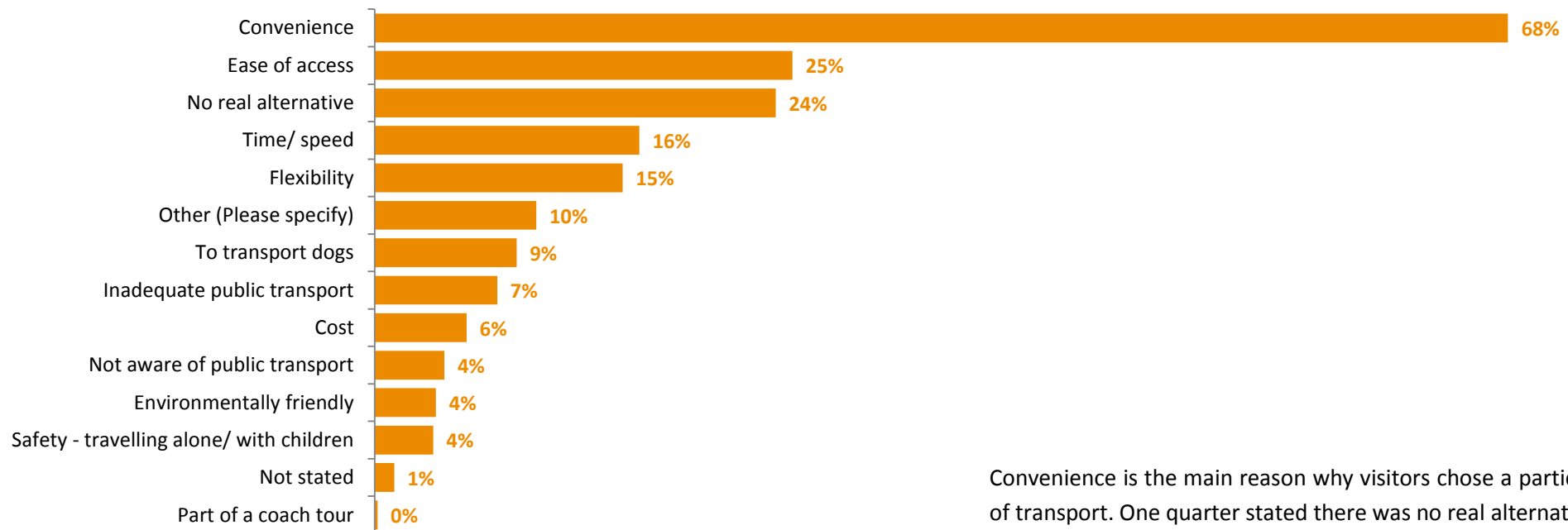
### Travel to the National Park



83% of visitors came to the area by car, indicating no significant change from 2005 when 85% came by car. Most of the survey sites were around car parks which will bias the data.

There will be destinations in the North West that attract greater numbers by bus or bicycle not sampled. 51% of visitors stated they did not travel elsewhere within the National Park.

### Reason for travel

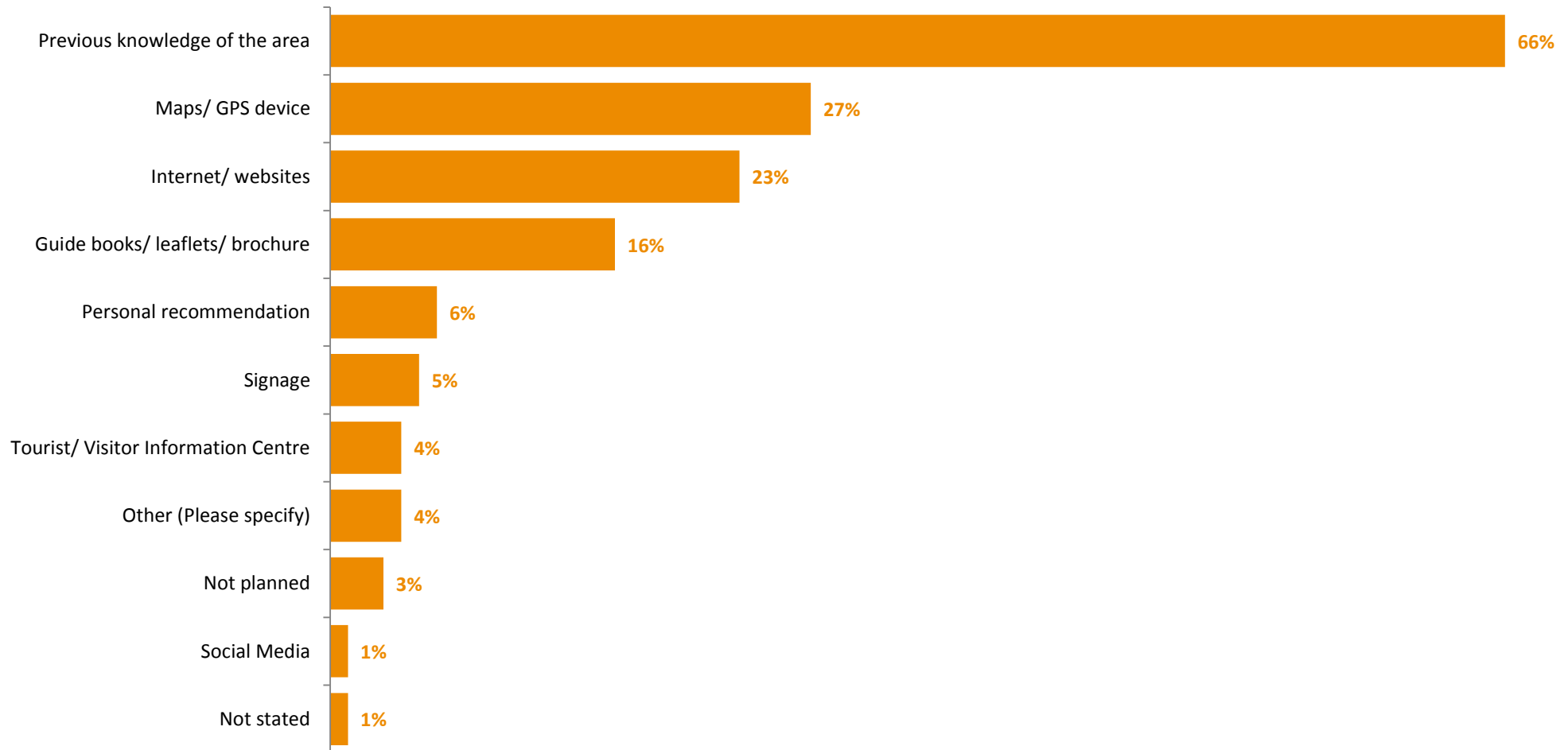


Convenience is the main reason why visitors chose a particular method of transport. One quarter stated there was no real alternative.

## Visitor Survey Results –How did they plan their visit?

### Visit Planning

Two thirds (66%) of respondents relied on previous knowledge of the area, which is similar to 2005 (68%). This is not surprising as many visitors come from the surrounding area and are frequent visitors.



## Visitor Survey Results – What did they spend money on?

### Spend

The average visitor spend is £14.37 for visitors who spent, and £10.35 for all visitors, including non-spenders. Just over a quarter (28%) of visitors to the National Park did not spend any money. Accommodation was the sector with the highest visitor spend. This is £26 compared with £23 in 2005 (Dark Peak).

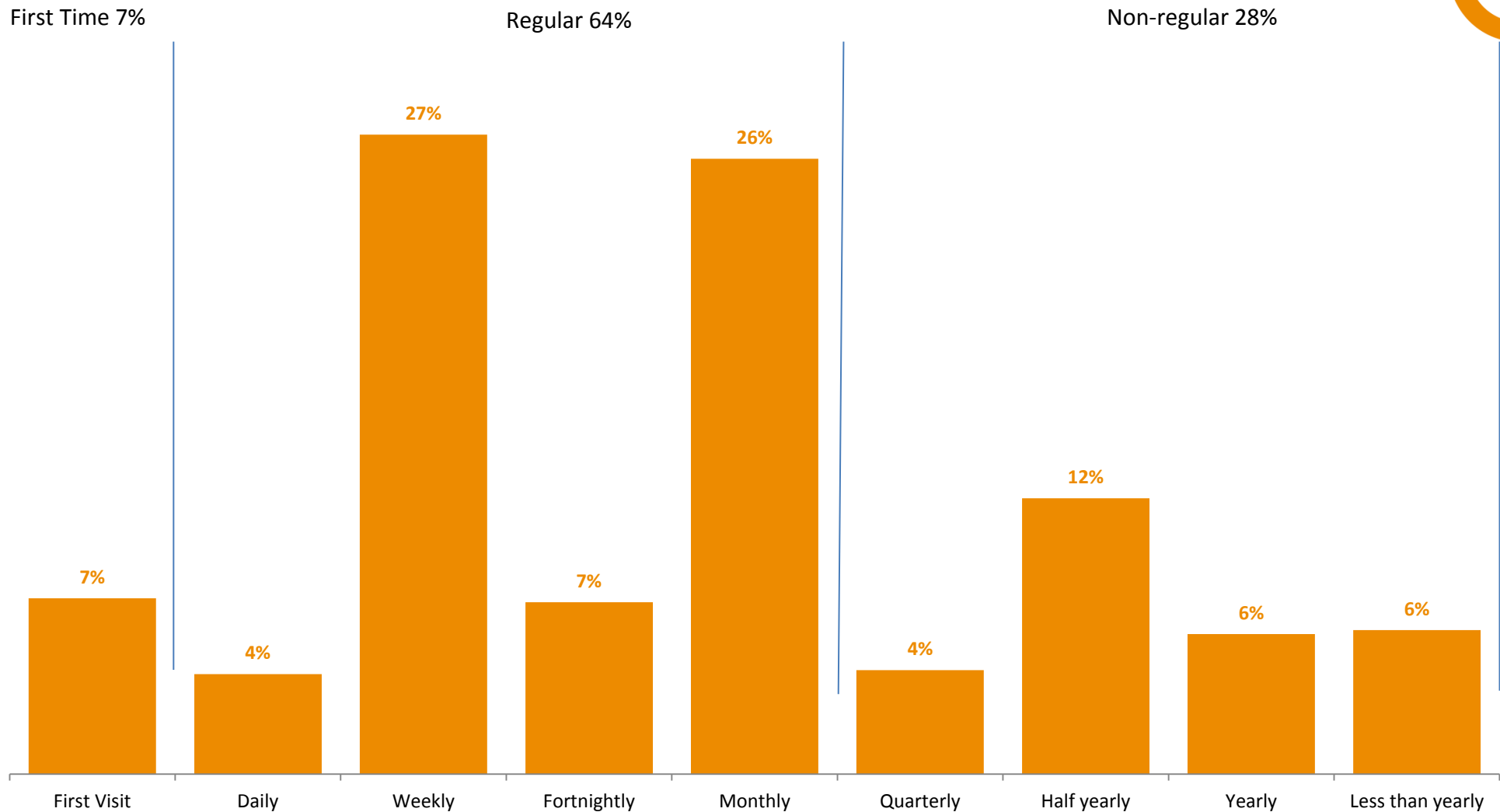
*Average spend per visitor (from those visitors who have spent) by spending category*



## Visitor Survey Results – How often do they come?

### Visit Frequency

Around two thirds of visitors are regular, repeat visitors (visiting at least once a month), just over a quarter are less frequent visitors and just 7% are first time visitors, the same as in 2005. (Does not equal 100% due to rounding).





Visitor Survey Results – Did they have a good time?

Satisfaction with visit



Almost all of visitors rate their time in the National Park positively (98% very good or quite good).

Likelihood of returning



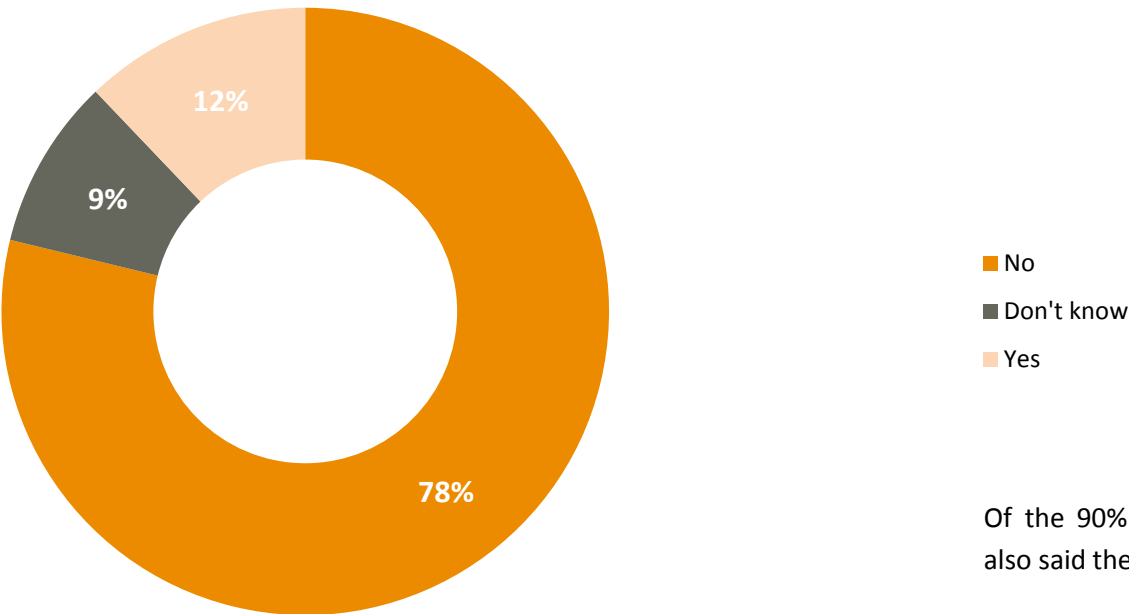
98% of respondents stated they would return, in 2005 this was also 98% . The six people who stated they are unlikely to return stated distance as the reason.

# Visitor Survey Results – Volunteering

## Have you ever volunteered for the PDNPA



## Proportion of non PDNPA volunteers that would consider volunteering in the future

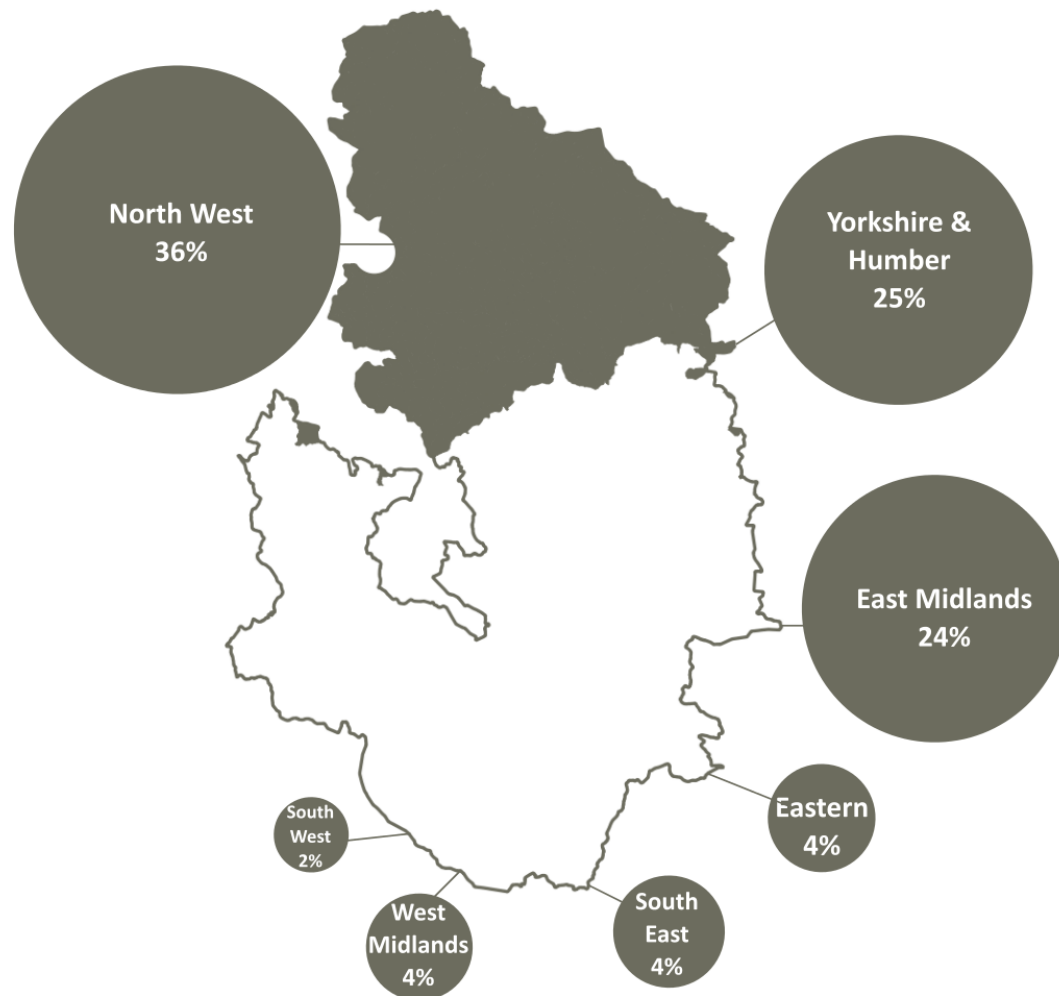


Of the 90% that said they haven’t volunteered three quarters also said they would not consider volunteering in the future.

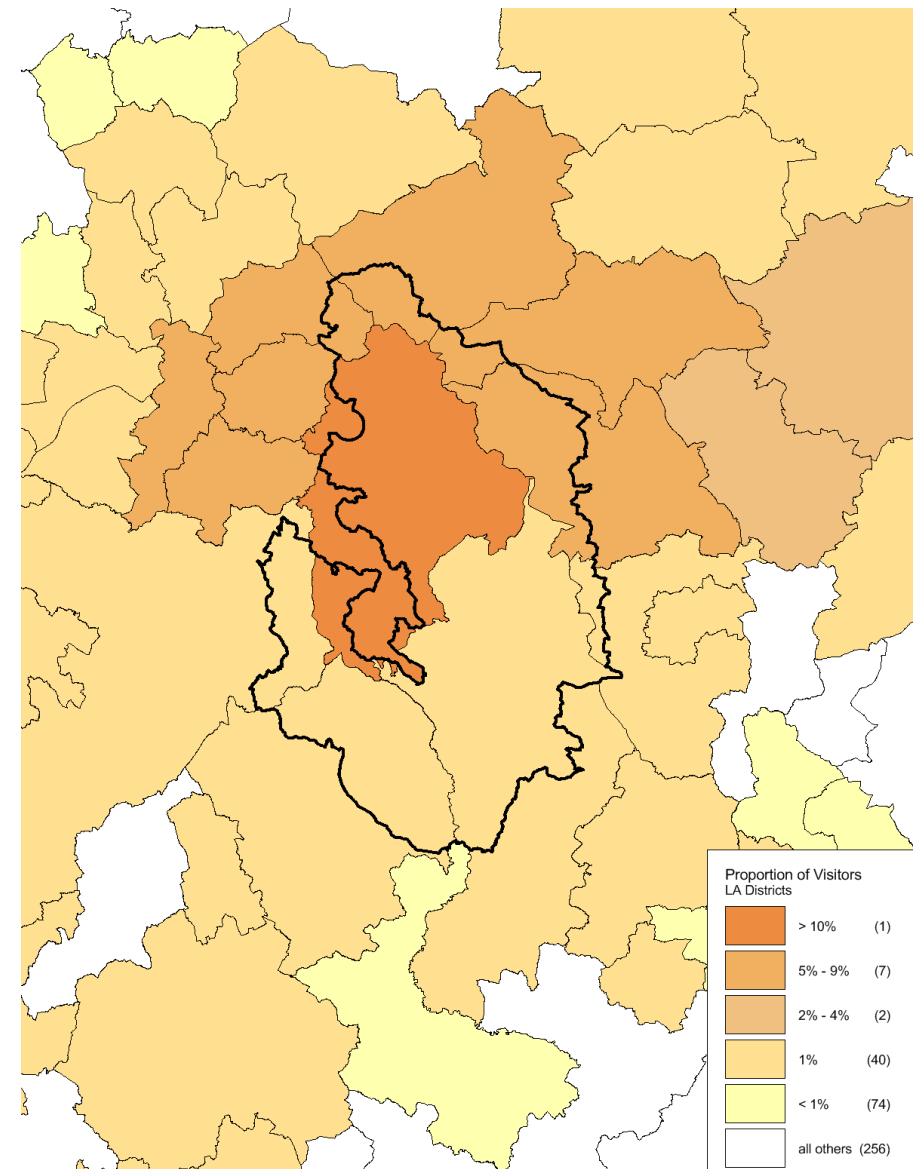
## Visitor Survey Results – Where do people come from?

### Postcodes of respondents

Postcodes of all respondedents were mapped, of which 466 postcodes were geocoded. These locations were queried against Local Authority Districts and Regions to quantify the proportion of visitors to each survey site from areas across the UK. Unsurprisingly, the majority of visitors to the North West of the Peak District came from North West England.



### Home Postcodes of all respondents by Local Authority District

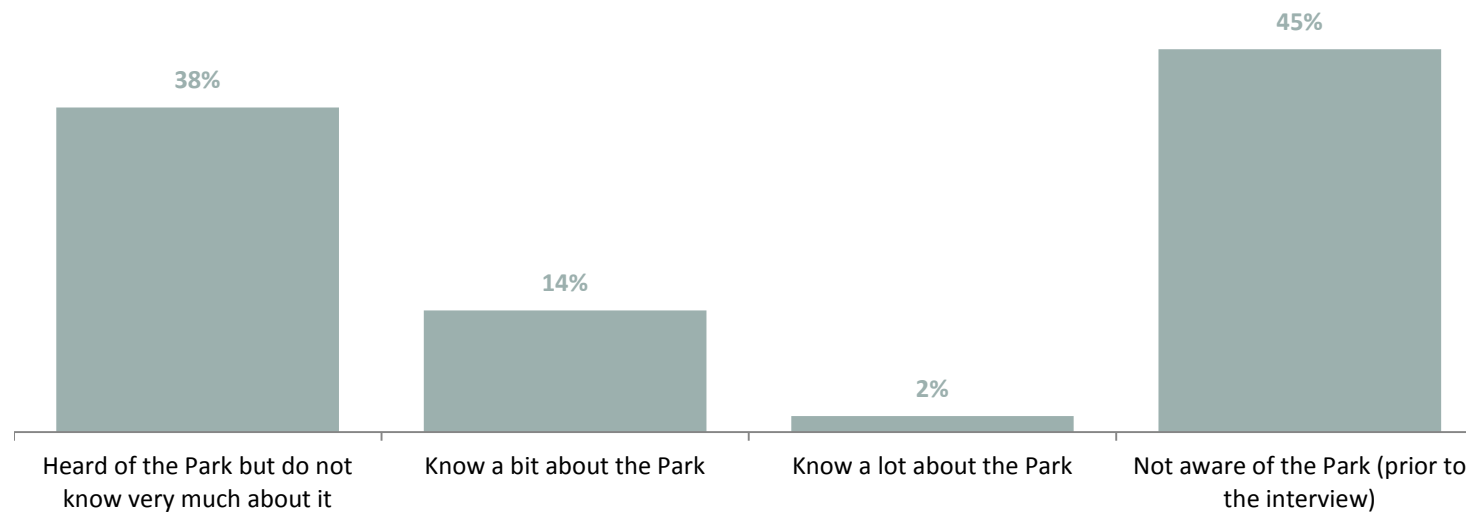


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## Non-Visitor Survey 2014 - Results

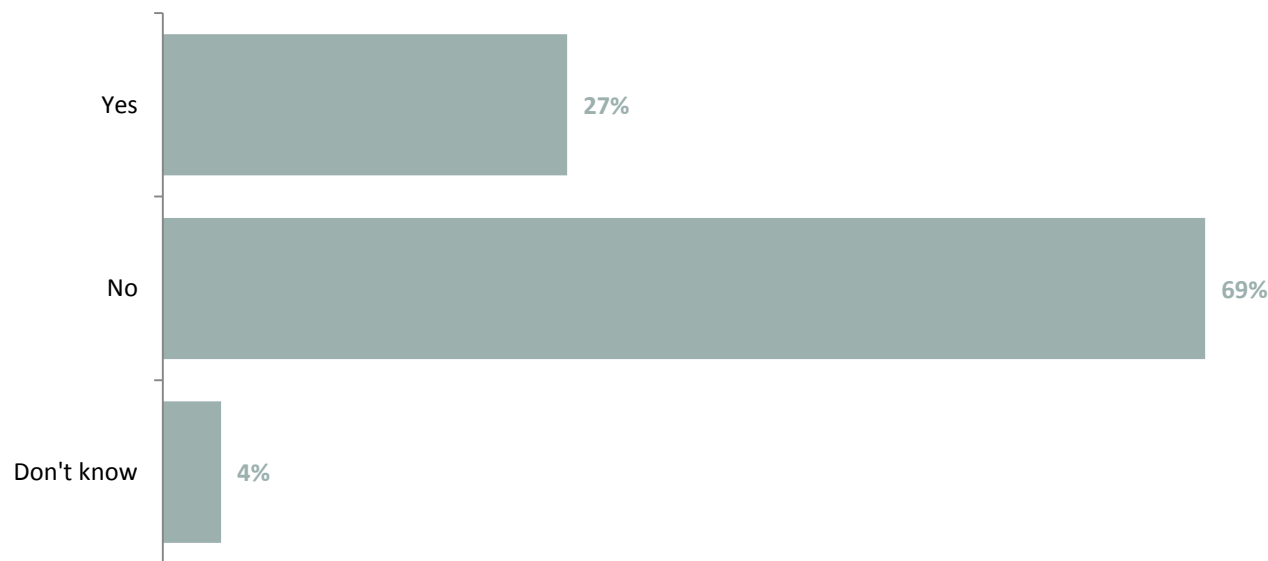
## Non-Visitor Survey Results – What do they know about the National Park?

### Knowledge about the Peak District



45% of non-visitors were not aware of the National Park prior to the interview. However, knowledge of National Parks and the Peak District National Park is quite high amongst the general population. In 2012, 90% of respondents aware of National Parks, although this survey includes responses from visitors and non-visitors. [Mg Clarity National Park Awareness Study 2012]

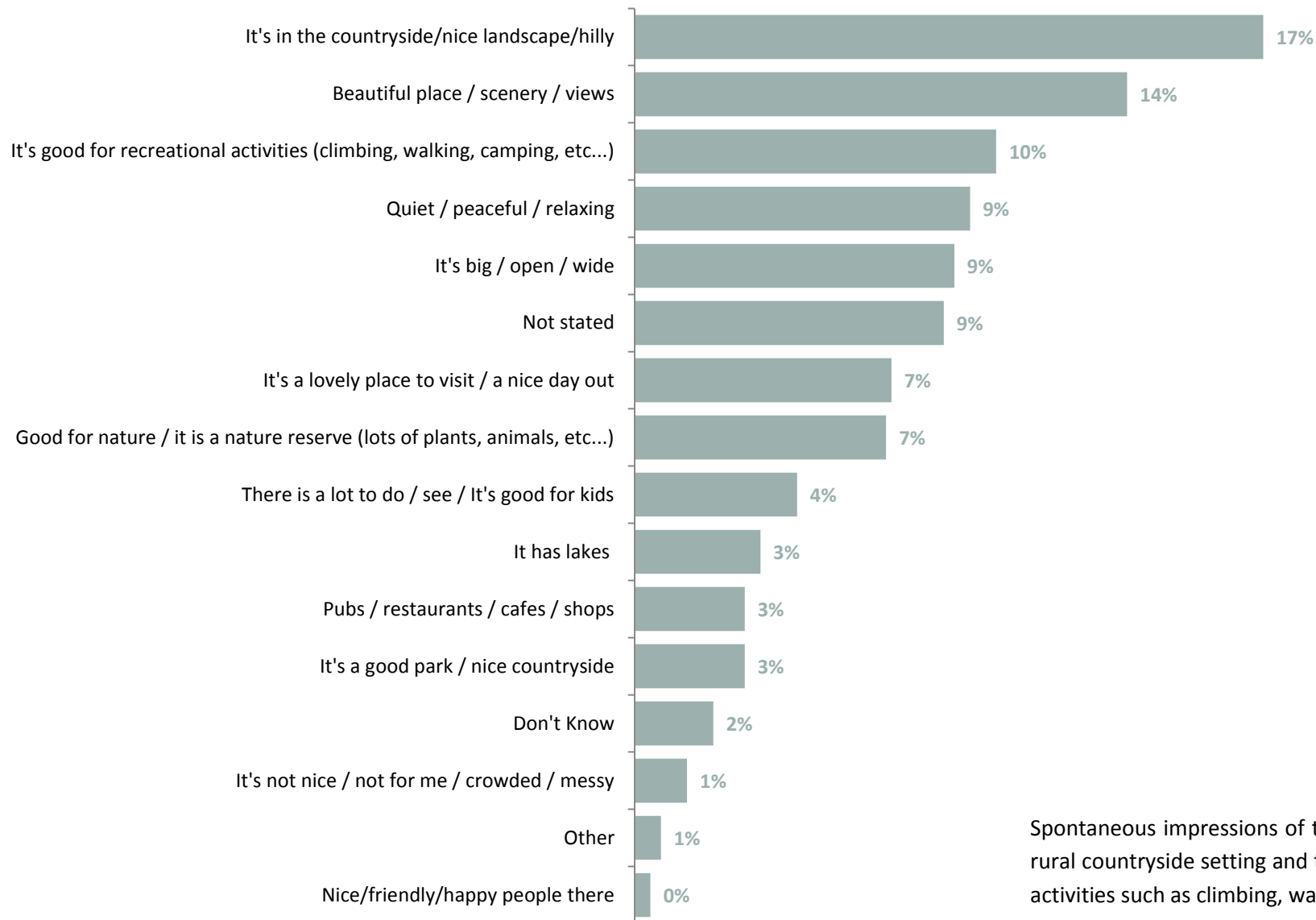
### Awareness of the National Park Authority



Just over one quarter of the non-visitors were aware of the Peak District National Park Authority.

## Non-Visitor Survey Results – What are their perceptions about the National Park?

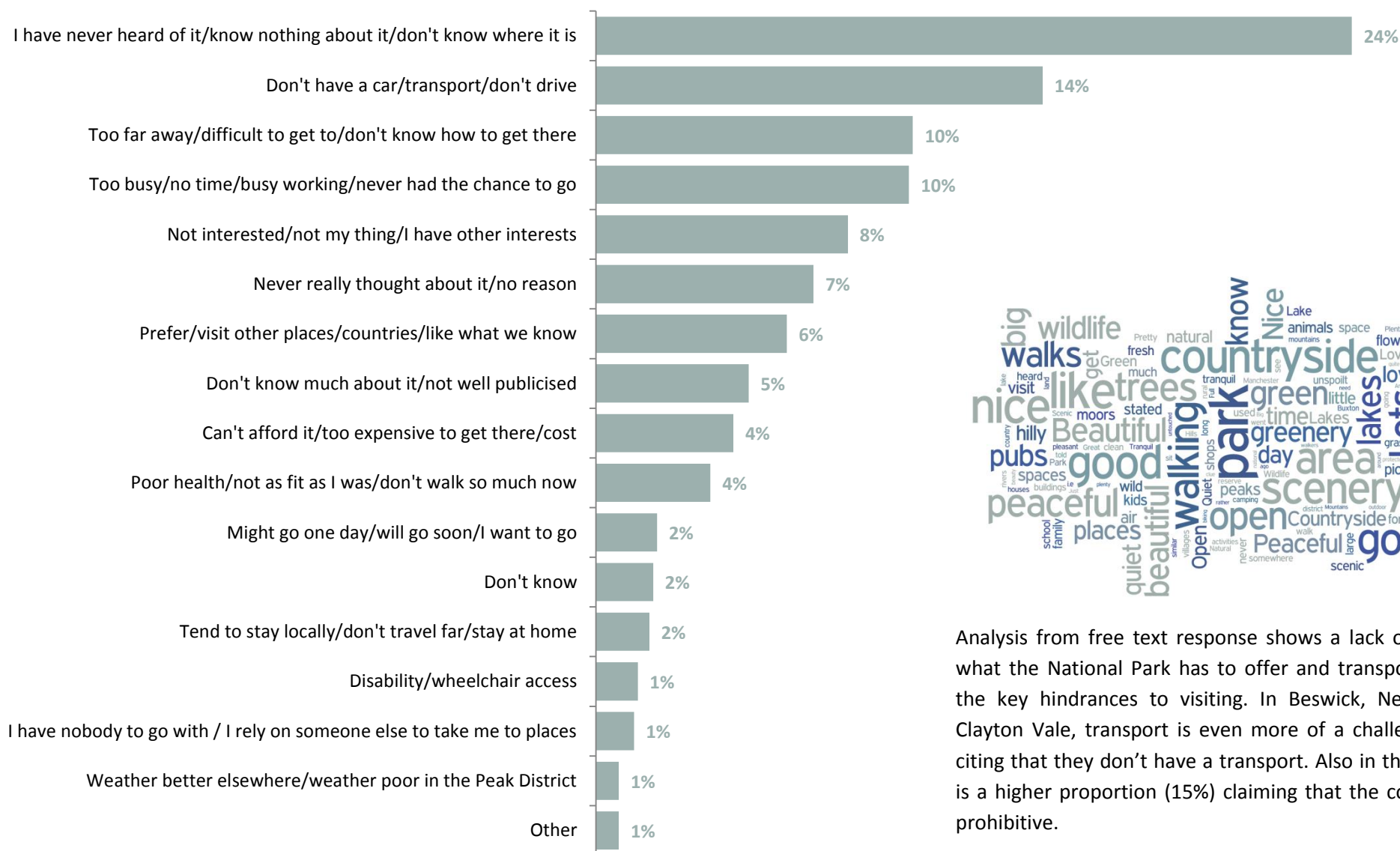
### Perceptions of the National Park (Open Question)



Spontaneous impressions of the National Park surround its vast, rural countryside setting and the associated outdoor recreational activities such as climbing, walking and camping.

## Non-Visitor Survey Results – Why don't they visit?

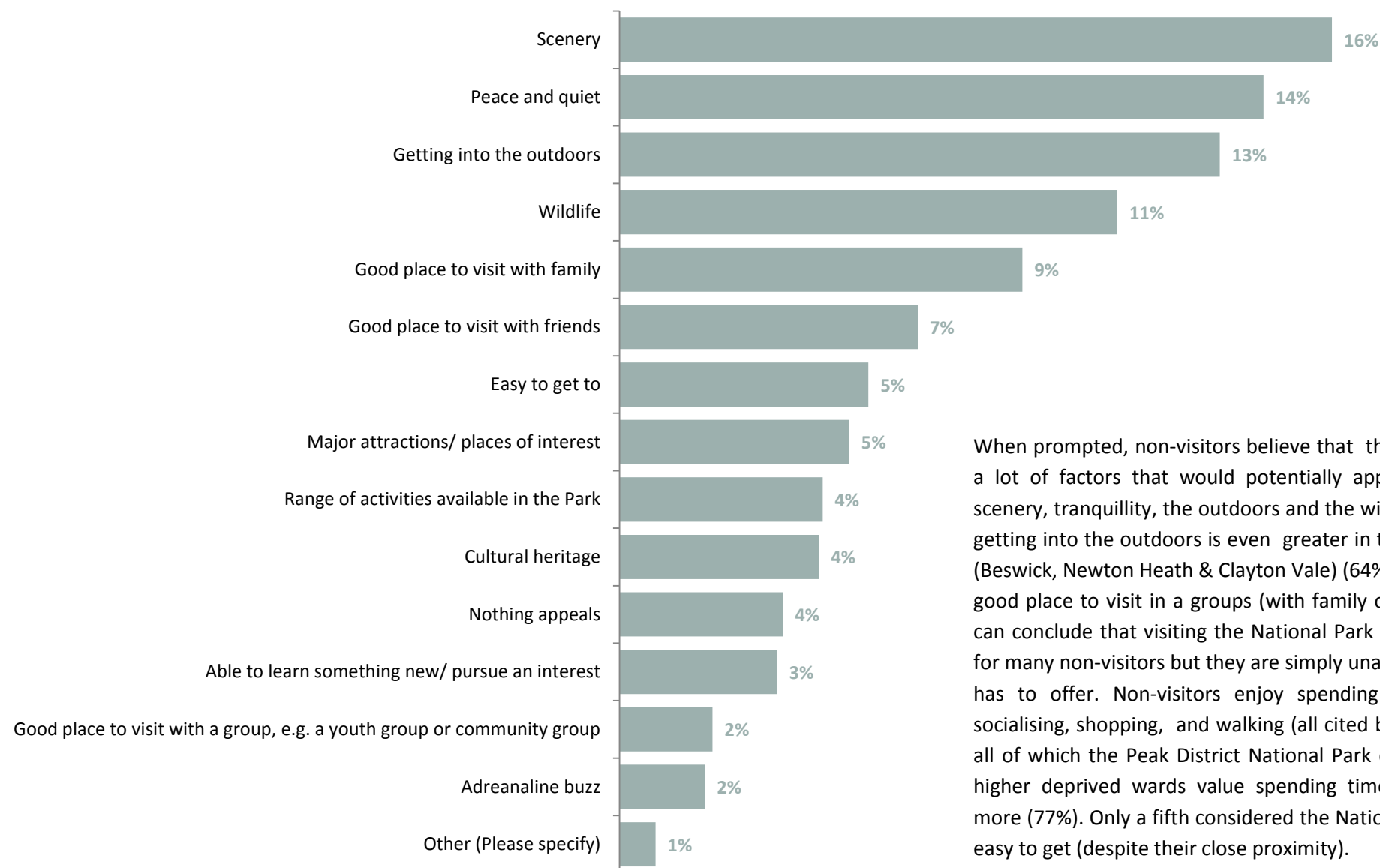
### Reasons for not visiting the National Park (Open Question)



Analysis from free text response shows a lack of awareness of what the National Park has to offer and transport facilities are the key hindrances to visiting. In Beswick, Newton Heath & Clayton Vale, transport is even more of a challenge with 27% citing that they don't have a transport. Also in these areas there is a higher proportion (15%) claiming that the cost of visiting is prohibitive.

## Non-Visitor Survey Results – What is appealing about the National Park?

### Appeal of the National Park

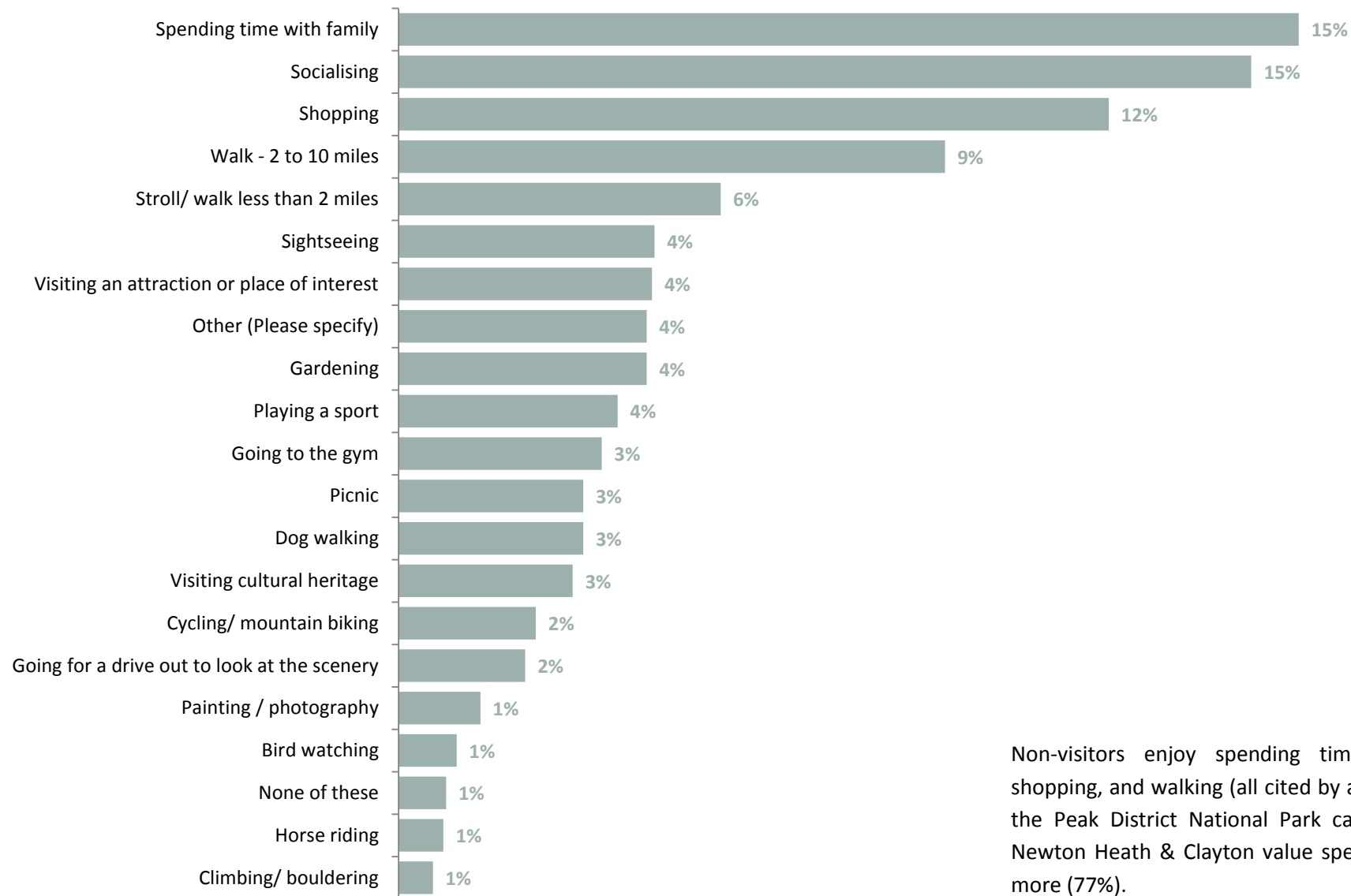


When prompted, non-visitors believe that the National Park has a lot of factors that would potentially appeal to them - the scenery, tranquillity, the outdoors and the wildlife. The appeal of getting into the outdoors is even greater in the deprived wards (Beswick, Newton Heath & Clayton Vale) (64%). It's also seen as a good place to visit in a groups (with family or with friends). We can conclude that visiting the National Park would be appealing for many non-visitors but they are simply unaware of it or what it has to offer. Non-visitors enjoy spending time with family, socialising, shopping, and walking (all cited by at least a third) – all of which the Peak District National Park can offer. Those in higher deprived wards value spending time with family even more (77%). Only a fifth considered the National Park to be fairly easy to get (despite their close proximity).



## Non-Visitor Survey Results – What do they do for leisure?

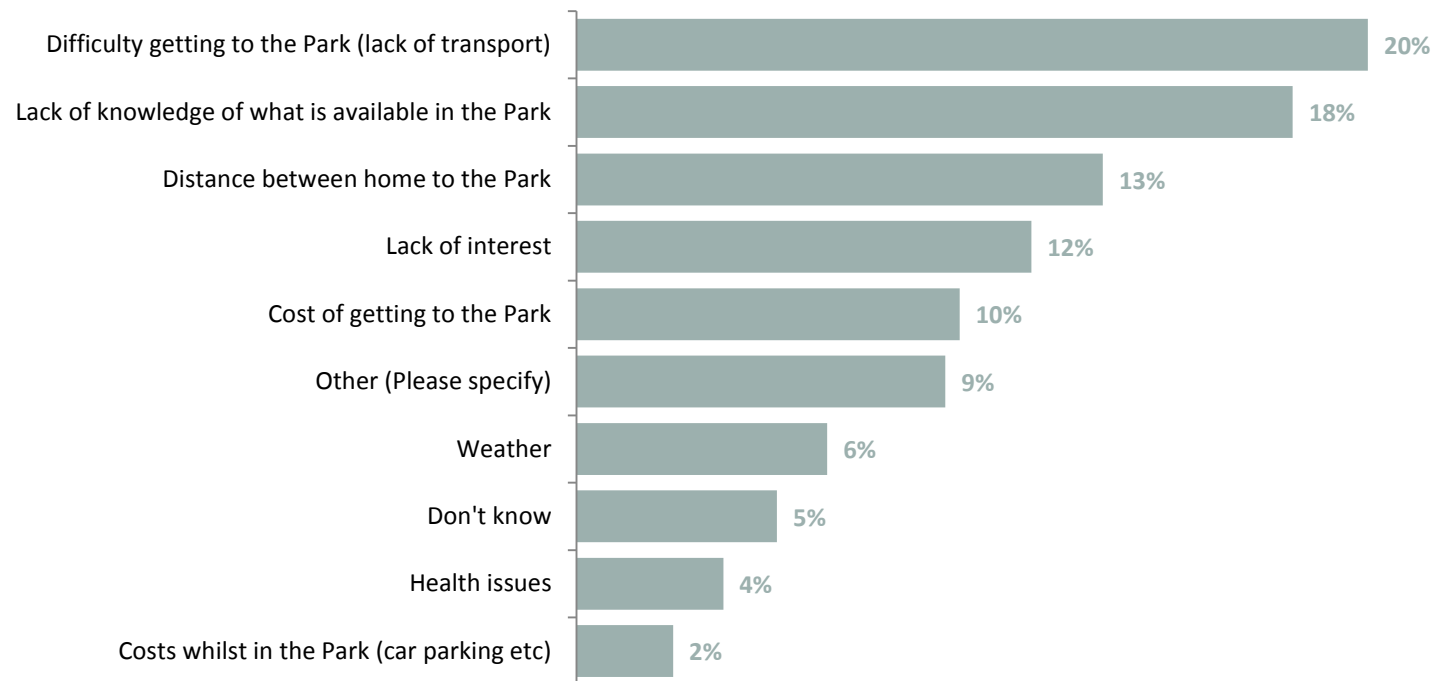
### Leisure Activities



Non-visitors enjoy spending time with family, socialising, shopping, and walking (all cited by at least a third) – all of which the Peak District National Park can offer. Those in Beswick, Newton Heath & Clayton value spending time with family even more (77%).

## Non-Visitor Survey Results – What stops them visiting the Peak District?

### Barriers to visiting the National Park



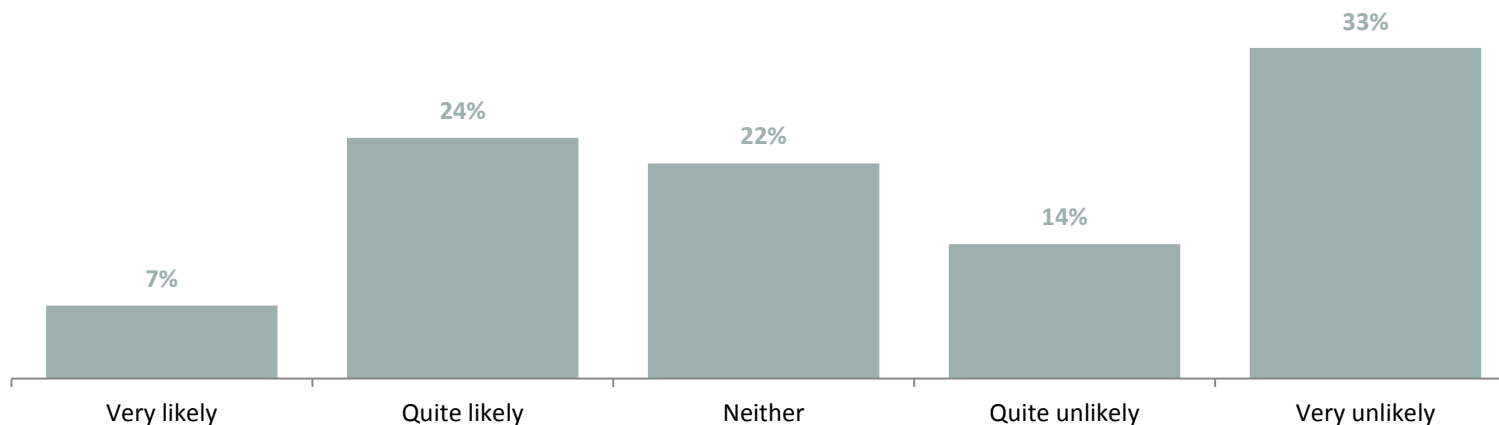
Transportation, distance and cost of getting to the National Park are barriers to visiting.

In the deprived wards (Beswick, Newton Heath & Clayton Vale), there is interest in visiting (only 10% cite lack of interest) but difficulty in getting to the National Park (52%) and the associated cost (31%) is perceived as a barrier.

Difficulty in getting to the Park was also most significant in the 65+ years group.

The lack of knowledge of what is available at the National Park means that many people don't have any real reason to visit.

### Likelihood to visit the National Park in the future

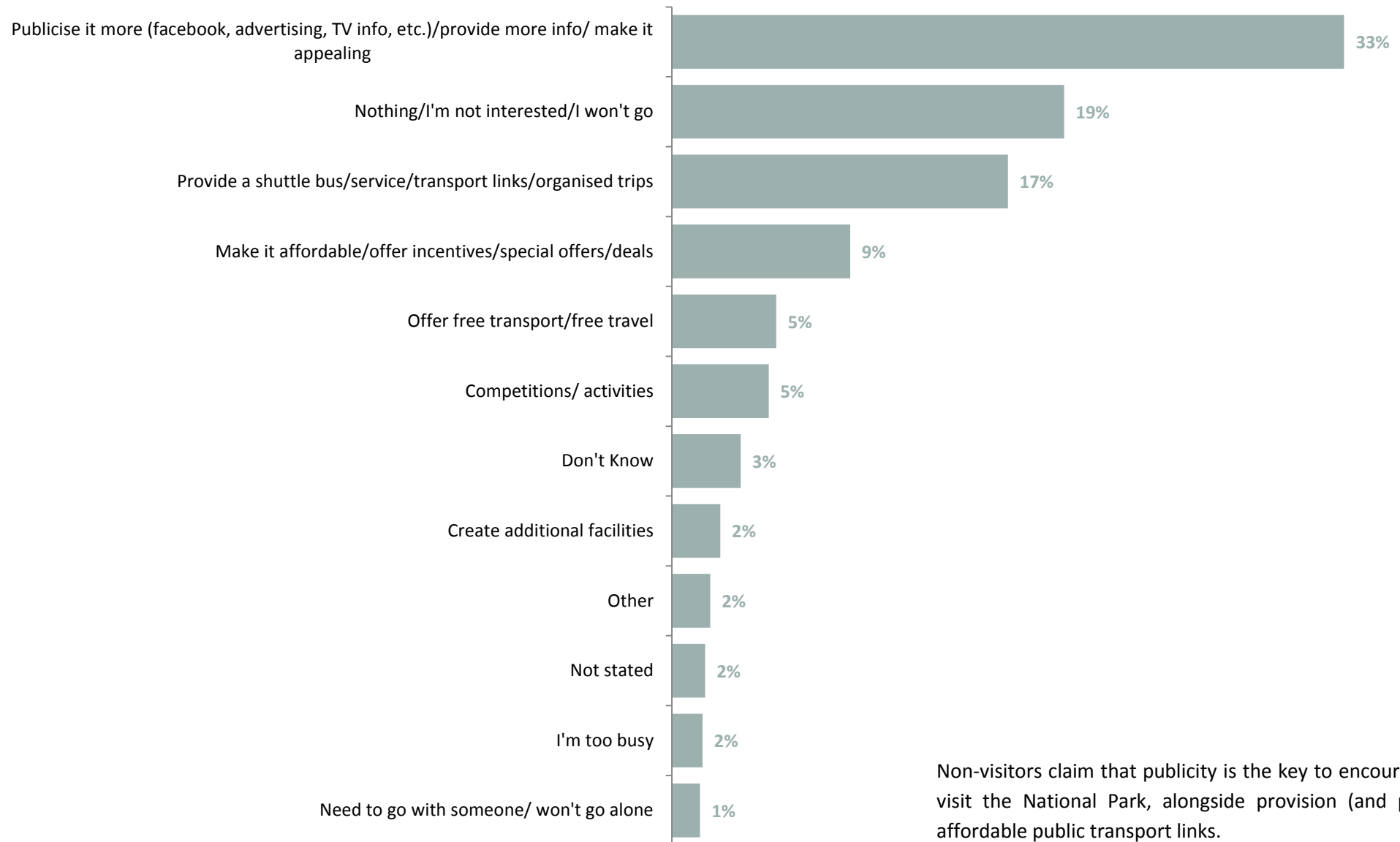


Just under half of all non-visitors state they are unlikely to visit the Peak District National Park in the future.

## Non-Visitor Survey Results –What would encourage them to visit?

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### Factors that would encourage visitors



Non-visitors claim that publicity is the key to encourage them to visit the National Park, alongside provision (and publicity) of affordable public transport links.