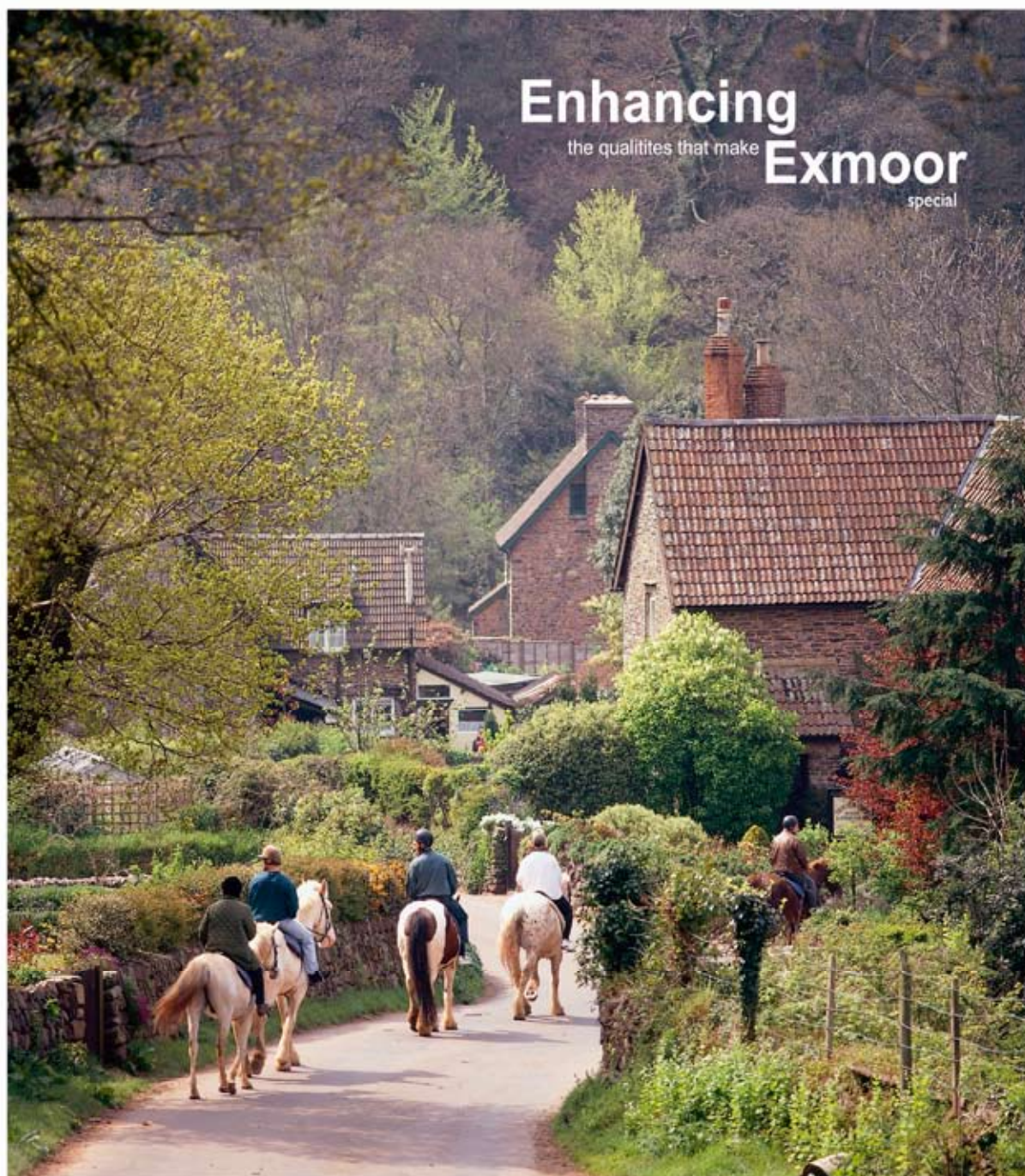


# Exmoor National Park

## State of Tourism Report 2008

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*“By 2020 there is a warm welcome and high quality experience for everyone who visits Exmoor seeking inspiration, tranquillity and active outdoor recreation, provided by a sustainable tourism and recreation economy in harmony with local communities and the environment, and contributing to the achievement of a carbon-neutral National Park”*

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## **Foreword**

This report was commissioned by Exmoor National Park Authority in 2008 to provide an overview of the state of tourism in the National Park. The timing of the report was intended to enable the Authority and others interested in the future development of tourism on Exmoor, to give better informed consideration of its role and relationship with the tourism industry following the closure of the Visit Exmoor partnership in November 2007.

**Part A** of the State of Tourism in Exmoor National Park draws together a number of pieces of research to give a picture of the tourism infrastructure, the economic impact of tourism, public awareness and visitor perceptions of the area.

**Part B** sets out the findings of a series of interviews undertaken in early 2008 with tourism accommodation providers based in the National Park

**Part C** sets out the strategic context for tourism development and promotional activities in the future.

## **Acknowledgements**

This report has been prepared on behalf of Exmoor National Park Authority by Julie Lovett, QUEST Project Manager. The report brings together data from a range of sources and includes specially commissioned research with tourism accommodation providers within the National Park undertaken during early 2008.

Particular thanks are due to David James, Managing Director, Global Tourism Solutions (UK) Limited, and to the local businesses who contributed to the 2006/7 occupancy survey and to the survey of accommodation providers.



## Exmoor National Park State of Tourism Report 2008

### Contents

<b>List of tables</b>	iii
<b>List of figures</b>	iv
<b>Executive Summary</b>	v
<b>Part A – The State of Tourism in Exmoor National Park</b>	1
A1 Introduction	1
A2 Tourism businesses within Exmoor National Park	3
A3 Visitor numbers and economic impact of tourism	5
A4 Occupancy levels	8
A5 Visitors to information centres	12
A6 Public awareness of Exmoor National Park	13
A7 Visitor profile	14
A8 How visitors view Exmoor	16
A9 Local perceptions of tourism	19
<b>Part B – 2008 Survey of Exmoor tourism businesses</b>	21
<b>Part C – The Development and Promotion of Tourism in Exmoor National Park</b>	34
C1 Introduction & Exmoor National Park Management Plan targets	34
C2 Tourism development activities and achievements 2006 & 2007	36
C3 Development and promotion of tourism on Exmoor	43
<b>Appendices</b>	
Appendix 1 Distribution of tourism businesses in Exmoor National Park	49
Appendix 2 Visit Exmoor activities and achievements 2006-07	50
Appendix 3 Survey of accommodation providers - questionnaire	55

## List of tables

1	Estimates of visitor numbers and expenditure in Exmoor National Park using the STEAM model (Global Tourism Solutions (UK) Ltd)	5
2	Estimated breakdown of visitor numbers and expenditure in Exmoor National Park in 2007 (Global Tourism Solutions (UK) Ltd)	6
3	Estimated visitor expenditure and employment supported in Exmoor National Park in 2007	7
4	Comparison of room occupancy for serviced accommodation in 2006	9
5	Comparisons of occupancy levels for self-catering accommodation in 2006	10
6	Age profile for visitors aged 16 and above from the 2005 visitor survey compared to similar surveys in the 1980s	15
7	Summary of responses received to the Exmoor National Park Management Plan consultation on tourism and recreation in 2006	19
8	Business survey results 1 – Business capacity and performance	30
9a	Business survey results 2 – Business marketing for service accommodation	31
9b	Business survey results 2 – Business marketing for self catering accommodation	32
10	Business survey results – Visitor profile	33
11	Objectives and targets for tourism from the Exmoor National Park Management Plan 2007-2012	35
12	Changing trends in tourism	45
13	Visit Exmoor generated press coverage from November 2006 to October 2007	52

## List of figures

1	Estimated breakdown of tourism expenditure by visitor category in Exmoor National Park in 2007 (Global Tourism Solutions (UK) Ltd)	6
2	Distribution of visitor spend in 2007 (Global Tourism Solutions (UK) Ltd)	7
3	Monthly trends in occupancy of visitor accommodation in Exmoor National Park during 2006 and 2007	8
4	Comparison of occupancy levels on Exmoor and South West region for serviced accommodation in 2006	9
5	Comparison of occupancy levels on Exmoor and South West region for self catering accommodation in 2006	10
6	Length of stay based on visitor survey in 2005	11
7	Numbers of visitors using information centres in the National Park	12
8	Visitor numbers to the National Park Centre in Dulverton during 2006 and 2007	12
9	Public awareness of National Parks in England and Wales (unprompted) (GfK NOP, 2007)	13
10	National Parks ever visited (GfK NOP, 2007)	13
11	Origin of UK visitors to Exmoor National Park (%)	14
12	Age profile for visitors from the 2005 visitor survey (Visit Exmoor / QUEST)	15
13	Visitor satisfaction ratings (Visit Exmoor / QUEST 2005)	16
14	Top ten reasons for visiting Exmoor (Visit Exmoor / QUEST 2005)	17
15	Top ten activities undertaken by visitors to Exmoor National Park (Visit Exmoor / QUEST 2005)	18
16	A comparison of actual occupancy levels with desired occupancy levels for 12 tourism accommodation business in Exmoor National Park for 2007	21
A1	Distribution of tourism accommodation in Exmoor National Park	49
A2	Visit Exmoor brand designed by Qube consultants	50
A3	Example of Visit Exmoor national press advertisement	51
A4	Visit Exmoor liveried taxi in Bristol – Autumn 2007 PR Campaign	51

## Executive Summary

- S1 Tourism is a vital component of the economy on Exmoor and more than 2,000 full time equivalent jobs are supported by tourism within the National Park, with over 400 businesses in the accommodation sector alone relying on visitors for their income.
- S2 The National Park receives approximately 2 million visitor days each year and visitors spend over £80 million. There has been an upward trend in visitor days and visitor spend showing a gradual growth since 2004, although 2007 saw a small decline during a very wet summer.

### Estimates of visitor numbers and expenditure in Exmoor National Park using the STEAM model (Global Tourism Solutions (UK) Ltd)

Year	2004	2005	2006	2007
Visitor Days (staying and day) (millions)	1.97	2.00	2.13	2.08
Visitor spend - Un-inflated figures (£'s m)	71.18	74.24	81.89	83.12
Visitor spend - All £'s 2007 indexed (£'s m)	78.37	79.23	85.36	83.12

- S2 A relatively high proportion of visitors stay in the National Park at least one night (46%) and staying visitors contribute more than 60% of income from tourism.
- S3 Tourism is still strongly seasonal on Exmoor with the peak visitor season running from Easter to the end of October, although the increase in reared and released pheasant and partridge shooting has extended the season for accommodation providers which cater for this market. Discussions with accommodation providers suggest that there is the capacity for this level of increase outside the busiest months, particularly earlier in the year to get the season off to an earlier start. Occupancy levels are higher for self-catering than serviced accommodation.
- S4 General public awareness of Exmoor in the UK is growing and compares well with other UK National Parks although the level is still not high with 13% naming Exmoor as a National Park (compared to 27% naming Lake District).
- S5 The majority of visitors to Exmoor National Park are People come from the UK (95.2%) with 43% from the South West, 18.5% from London and the South East and 18% from the Midlands. 4.8% of visitors are from overseas, from 20 different countries. Accommodation providers report an increasing trend in visitors from Bristol and visitors from Wales.
- S6 Levels of repeat visits to the area are high - in the 2005 survey 80% of respondents were repeat visitors, with 20% visiting more than four times a year and 89% planning to visit the area again.
- S7 More than two thirds of visitors are aged 45 and above and there are indications that the proportion of visitors aged 25 to 44 years has decreased considerably since the 1980's. This age group is likely to be accompanied by younger children and the trend, if true, indicates a need to promote Exmoor more as a family destination.
- S8 Visitor surveys show high levels of visitor satisfaction, with 96% of respondents rating their overall satisfaction with their visit as good or very good. The cost of parking and ease of getting to and around the area received relatively low satisfaction ratings.



- S9 The main attractors for visitors are scenery (93% of those polled); tranquillity; the area's status as a National Park; opportunities for outdoor activities; the coast and wildlife. The majority of visitors participate in visiting towns and villages; short walks; eating out and sightseeing by car.
- S10 There is capacity for growth in the number of visitors, particularly staying visitors who contribute more to the local economy without any significant adverse impacts on the environment or local communities. Public consultation in preparation for the Exmoor National Park Management Plan found that 73% of people living in the National Park agreed with the statement "I would not object if visitor numbers in Exmoor National Park increased by 25% compared to current levels". There was less support for a higher level of increase.
- S11 A small sample of local accommodation businesses experienced annual occupancy levels across the year of between 16% and 77% of capacity with higher levels for self-catering than serviced accommodation. Many of the businesses are close to 100% occupancy in the peak months and the relatively small scale of the businesses that are mostly family run means that most are content with existing levels or seeking modest increases in occupancy in the shoulder months with few seeking 100% occupancy all year round.
- S12 Businesses use a variety of avenues for marketing and most see the internet as their most valuable marketing tool. The lowest occupancy levels are experienced by businesses that rely solely on passing trade, referrals and repeat visitors. However, repeat visitors are an important source of business, ranging from 33% to 95% of staying guests, which emphasises the importance of providing a good visitor experience.
- S13 Events and festivals make an important contribution to occupancy although businesses report mixed impact with most impact within the locality of the event. Relatively few businesses appear to make active use of forthcoming events in targeted marketing.
- S14 Considerable change is taking place in the organisation of tourism development and promotion at national, regional and local levels. Exmoor has a strong and positive identity and this needs to be actively promoted. However, local resources are very limited and the organisation of sub-regional tourism development on a county basis has the potential to make promotion of the Exmoor brand more difficult.
- S15 Considerable success has been achieved by Active Exmoor in promoting the area for outdoor activities and high profile events such as the Ironman Triathlon. However, the cessation of Visit Exmoor has left a gap in coordination of marketing and promotional effort and alternative approaches should be a priority.



# Part A – The State of Tourism in Exmoor National Park

## A1 Introduction

A1.1 Tourism is a vital component of the economy on Exmoor. There is a close synergy between the tourism industry, which is so vital to maintaining a healthy economy, and the statutory purposes for National Park designation, that is:

- to conserve and enhance the natural beauty, wildlife and cultural heritage of the area
- to promote opportunities for the understanding and enjoyment of its special qualities by the public.

Achievement of the first purpose sustains the principal draw of visitors to the area and the second purpose can be achieved, in part, by equipping tourism providers with the knowledge and information required to enable them to assist their guests to understand and enjoy the special qualities of Exmoor National Park.

A1.2 In recent years Exmoor National Park Authority has worked with its partner organisations and businesses to ensure that Exmoor is a quality tourism destination which delivers a consistently high quality visitor experience and maintains a vibrant and sustainable tourism industry which brings benefits to the environment and local communities.

A1.3 The Authority was a key partner in the Visit Exmoor tourism partnership which successfully raised awareness of the area through a media campaign in 2007. It has hosted the QUEST project which published the Strategic Action Plan for Sustainable Tourism in the greater Exmoor Area 2004 – 2009 and implemented or assisted with many of the actions set out in the plan, including training for businesses, research and quality improvements.

A1.4 Specific projects have been successful in developing tourism in and around the National Park such as the Coleridge Way project which has provided a new short break attraction bringing visitors to an under-visited part of Exmoor and linking Exmoor to the Quantock Hills, working closely with tourism businesses and landowners along the route. The Events and Festivals project has contributed to a vibrant programme of events in the area and the Active Exmoor project has made significant achievements in developing the potential of the area for outdoor recreation, including prestigious international events such as the 'Ironman' triathlon and 'Tour of Britain' cycle race.

A1.5 In 2007 Exmoor National Park Authority was awarded the **European Charter for Sustainable Tourism in Protected Areas** which recognises National Parks across Europe that are following the right approach to developing and managing sustainable tourism.

A1.6 This report was commissioned by Exmoor National Park Authority in 2008 to provide an overview of the state of tourism in the National Park. The timing of the report was intended to enable the Authority to give better informed consideration of its role and relationship with the tourism industry following the collapse of the Visit Exmoor partnership during 2007.

A1.7 Part A of the State of Tourism in Exmoor National Park draws together a number of pieces of research to give a picture of the tourism infrastructure, the economic impact of tourism, public awareness and visitor perceptions of the area.

A1.8 The information used in Part A of the report is derived from a number of sources:

- The **QUEST database** which was developed following a tourism product audit in 2005 as part of the Strategic Action Plan for Sustainable Tourism 2004 – 2009. This holds information such as business type, location, size, quality grading, etc., on all known tourism businesses in the area.
- Annual **STEAM reports** which have been commissioned by Exmoor National Park Authority from Global Tourism Solutions UK Ltd since 2005 and which provide an indicative base on which to monitor trends in the tourism economy.
- **Visitor satisfaction surveys**, including the most recent large scale survey of visitors in Exmoor National Park that was carried out in 2005 as part of the QUEST Project.
- Figures on general **public awareness** of National Parks provided by national surveys commissioned by the Association of National Park Authorities (ANPA).
- A **tourism business survey** undertaken by the QUEST Project Manager in the early part of 2008 and based on a series of interviews with accommodation providers in the National Park

## **A2 Tourism businesses within Exmoor National Park**

### ***Accommodation providers***

- A2.1 The QUEST database of tourism providers in the area lists 403 accommodation providers within Exmoor National Park.
- 211 hotels, guest houses, b&bs and inns (serviced) providing over 1300 rooms
  - 202 self-catering businesses with 348 cottages and apartments between them
  - 29 camping and touring caravan sites with 829 pitches
  - 3 Youth Hostels and 2 YHA camping barns plus a residential education centre run by Exmoor National Park Authority at Pinkery
- A2.2 Serviced accommodation comprises mainly small businesses, often run by one couple. In 2007, 43% of the known stock offered 3 bedrooms or under and 43% offered between 4 and 9 bedrooms. The largest hotel offered 66 rooms, with only 3% of serviced accommodation providing more than 20 rooms.
- A2.3 55% of serviced accommodation and 51% of self-catering businesses on Exmoor have a nationally recognised accommodation grading from the AA or VisitBritain. Nationally 49% of the known stock of serviced accommodation has a star rating: the assessment scheme is voluntary and accommodation owners pay an annual fee for the assessment. Government targets for serviced accommodation grading are 55% for 2008, 75% for 2012 and 85% by 2016.
- A2.4 The accommodation map in appendix 1 gives an indication of the location of accommodation businesses. Around half are on the coastal strip, mainly concentrated in Lynton, Lynmouth and Porlock. The remainder are scattered across the inland areas of the National Park, with concentrated pockets around some of the larger settlements such as Dulverton, Exford and Dunster.

### ***Visitor attractions***

- A2.5 The main attraction for visitors to the National Park is the high quality environment (see paragraph A8.6) and much of the visitor provision on Exmoor is aimed at enhancing access to the area's special features. Visitor facilities include:
- 3 National Park Centres (Dulverton, Dunster and Lynmouth)
  - 2 Tourist Information Centres (Porlock and Lynton)
  - 13 Local Information Points
  - A programme of six annual festivals
  - An annual programme of guided walks
  - The Public Rights of Way network totalling 965 kilometres, of which 527km are accessible to cyclists and horse riders,
  - Approximately 19,000 hectares of Access Land
  - The South West Coast Path National Trail, and regional trails such as the Two Moors Way, MacMillan Way West, Samaritans Way and the Coleridge Way
  - Wimbleball Lake, a reservoir offering sailing, canoeing, fishing
  - Opportunities for field sports and fishing

- Canoeing agreements on parts of the River Barle and East Lyn River
- 14 attractions with an entrance fee and three wildlife safari companies

### ***Visitor attractions***

A2.6 The National Park contains a relatively small number of visitor attractions, although there are additional commercial attractions close to the National Park in West Somerset and northern Devon. Attractions located in the National Park include:

- Alta Lyn Alpacas
- Dulverton Guildhall Heritage Centre
- Dunster Dolls Museum
- Dunkery Vineyard
- Dunster Castle (The National Trust)
- Dunster Working Water Mill
- Exmoor Pony Centre (Moorland Mousie Trust)
- Exmoor Falconry and Animal Farm (Bossington)
- Glen Lyn Gorge
- Greencombe
- Lynton & Barnstaple Railway
- Lynton & Lynmouth Cliff Railway
- Two Rivers Paper Mill
- West Somerset Rural Life Museum (Allerford)

### **A3 Visitor numbers and economic impact of tourism in Exmoor National Park**

- A3.1 The STEAM (Scarborough Tourism Economic Activity Monitor) report has been commissioned by Exmoor National Park Authority from Global Tourism Solutions UK Ltd (GTS UK) since 2005. Figures for 2004 were also included based on existing information. STEAM is designed to provide an indicative base to monitor trends in the tourism economy.
- A3.2 STEAM approaches the measurement of tourism at a local level from the supply side. It quantifies the local economic impact of day and staying visitors by analysing bed stock, occupancy percentages, attendance at attractions and visits to visitor centres, and uses this to provide an indicative base for monitoring trends. The estimated visitor numbers and expenditure within Exmoor National Park from 2004 to 2007 is set out in table 1

**Table 1 – Estimates of visitor numbers and expenditure in Exmoor National Park using the STEAM model (Global Tourism Solutions (UK) Ltd)**

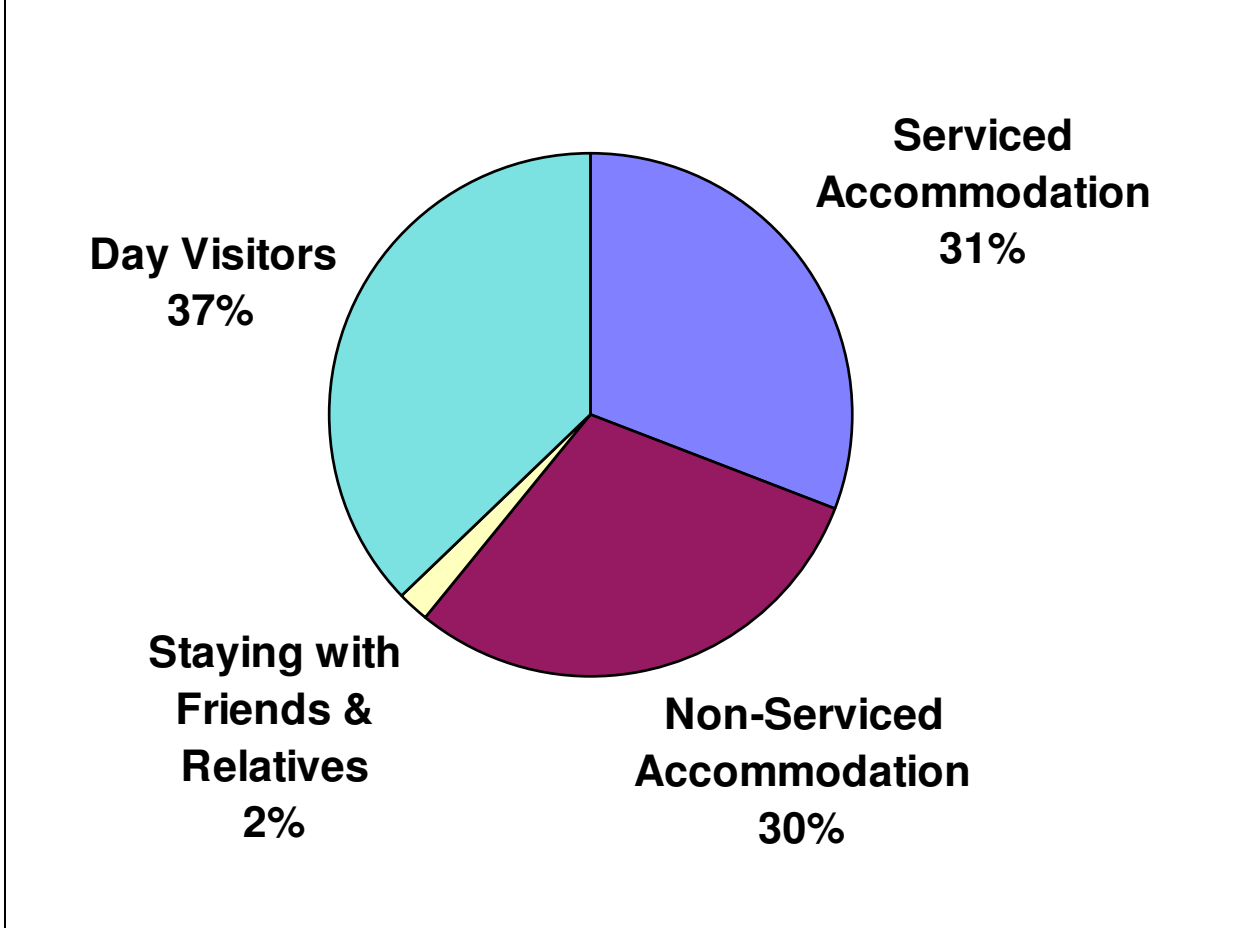
<b>Year</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>
Visitor Days (staying and day) (millions)	1.97	2.00	2.13	2.08
Visitor spend - Un-inflated figures (£'s millions)	71.18	74.24	81.89	83.12
Visitor spend - All £'s 2007 indexed (£'s millions)	78.37	79.23	85.36	83.12

- A3.3 The STEAM analysis indicates that there are approximately 2 million visitor days to the National Park each year (Table 1). The analysis indicates a small increase of around 5% in visitor days since 2004, although 2007 was slightly down on 2006, probably the effect of poor weather during the peak season.
- A3.4 The analysis also estimates that over £80 million a year is brought into the economy within Exmoor National Park by visitors. Allowing for inflation, the level of visitor expenditure has increased in real-terms since 2004, although the data indicates a small dip in 2007 in line with the small drop in visitor numbers that year compared to 2006.
- A3.5 Table 2 and the pie chart in figure 1 indicate the distribution of visitor numbers and expenditure between day and staying visitors. This shows the economic value of visitors to Exmoor, with staying visitors constituting 47% by number and generating 63% of the income.
- A3.6 Figure 2 shows the distribution of visitor expenditure and table 3 indicates the local employment supported by tourism in the National Park. The majority of visitor income is derived from accommodation, catering and shopping. Some seasonal events, such as Snowdrop Valley Park & Ride, local shows and point-to-point events, etc., charge for parking, transport or an entrance fee and there is probably scope to increase tourism income from organised activities.

**Table 2 – Estimated breakdown of visitor numbers and expenditure in Exmoor National Park in 2007 (Global Tourism Solutions (UK) Ltd)**

Category	Number of visitor days	%	Expenditure (£'millions)	%	Average expenditure per visitor per day
Serviced accommodation	329,050	15.79	£25.60m	30.80	£77.82
Non-serviced accommodation	595,260	28.57	£25.01m	30.10	£42.03
Staying with friends & relatives	40,880	1.96	£ 1.49m	1.80	£36.59
Day visitors	1,118,680	53.68	£31.00m	37.30	£27.71
<b>Total</b>	<b>2,083,880</b>		<b>£83.10m</b>		<b>£39.89</b>

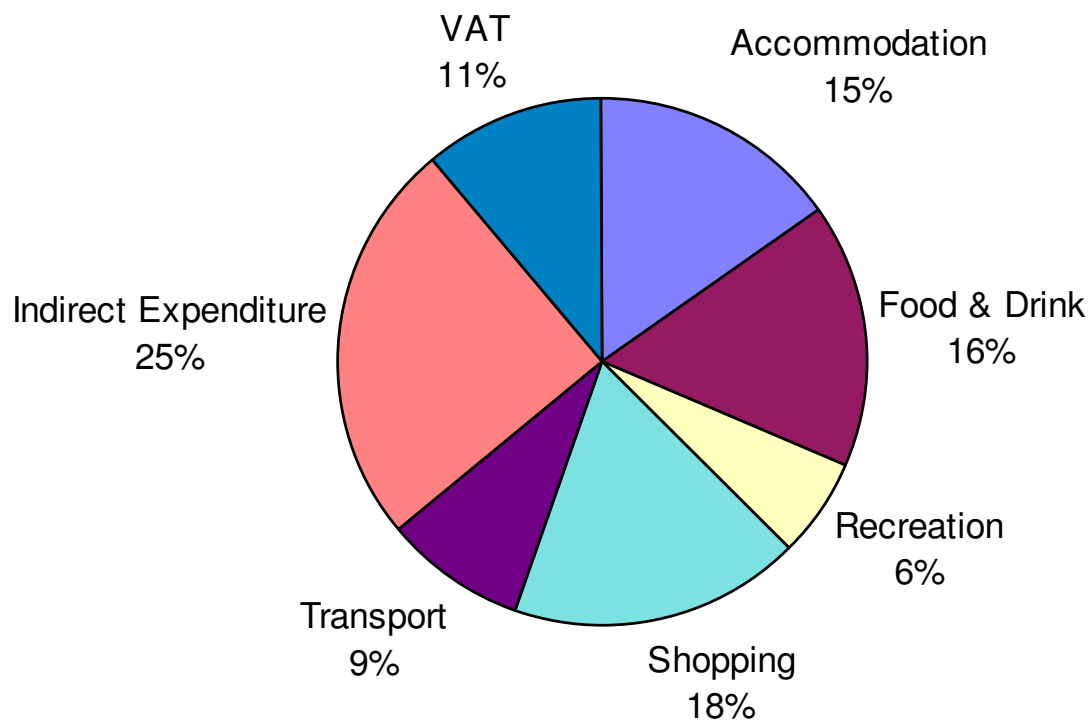
**Figure 1 – Estimated breakdown of tourism expenditure by visitor category in Exmoor National Park in 2007 (Global Tourism Solutions (UK) Ltd)**



**Table 3 – Estimated visitor expenditure and employment supported in Exmoor National Park in 2007**

Sector	Visitor expenditure (£' millions)	Sector	Employment (Full-time equivalent)	Expenditure per job (£/fte)
		<b>Direct Employment</b>		
Accommodation	12.81	Accommodation	1,079	£11,877
Food & Drink	13.28	Food & Drink	276	£48,043
Recreation	5.07	Recreation	128	£39,590
Shopping	14.89	Shopping	282	£52,700
Transport	7.08	Transport	66	£107,538
		<b>Total Direct Employment</b>	<b>1,831</b>	
Indirect Expenditure	20.70	Indirect Employment	284	
VAT	9.30			
<b>TOTAL</b>	<b>83.12</b>	<b>TOTAL</b>	<b>2,116</b>	

**Figure 2 – Distribution of visitor spend in 2007 (Global Tourism Solutions (UK) Ltd)**

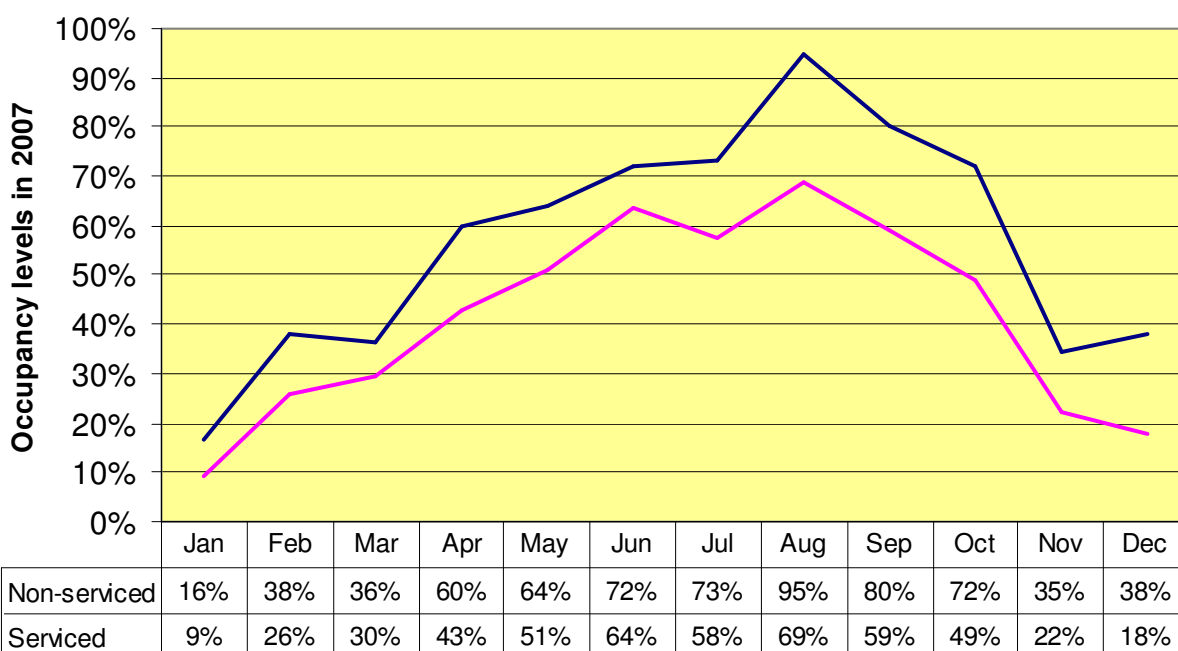
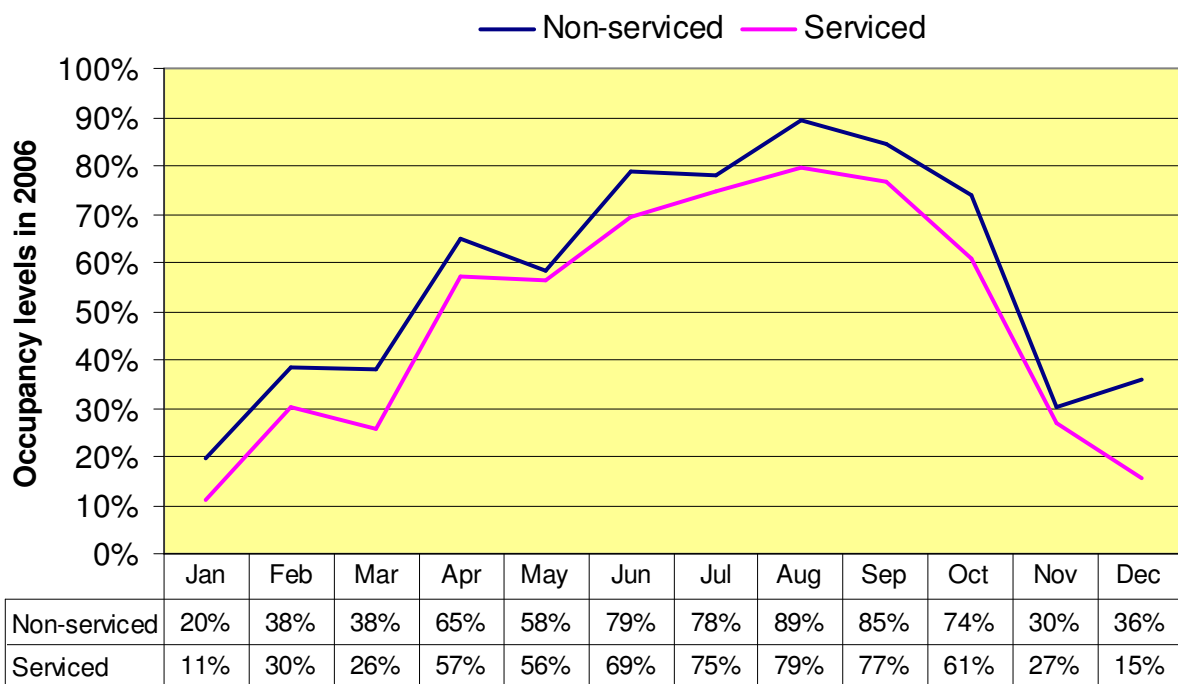




## A4 Occupancy levels

A4.1 Traditionally, occupancy surveys for the region have used information collected by South West Tourism and Devon County Council. The sample sizes for Exmoor National Park have always been very low, with only 3 or 4 accommodation providers within the National Park providing occupancy details. In order to address this issue, Exmoor National Park Authority and GTS carried out an occupancy survey in January 2008 mailing forms for 2006 and 2007 occupancy to all known accommodation stock within the Park in order to obtain a larger sample. 400 forms were sent out and 10% of the businesses replied.

**Figure 3 – Monthly trends in room occupancy of visitor accommodation in Exmoor National Park during 2006 and 2007**



- A4.2 The results for 2006 and 2007 showed average occupancy levels on a month-by-month basis. In 2006 the annual overall occupancy for self-catering units was 60% and 51% for serviced accommodation. In 2007 the occupancy across the year was 58% for self-catering and 45% for serviced accommodation. Figure 3 shows the spread of occupancy across the year in 2006 and 2007.
- A4.3 April to October are the busiest months for all visitor accommodation and there is a sharp decline for occupancy in November. A particularly wet summer probably led to a decrease in occupancy in 2007, with room occupancy for serviced accommodation falling by 23% in July compared to the same month in 2006. Occupancy levels also fell in August and September but numbers were up on the previous year from October to December and the overall decrease for the year was only 2% for self-catering but 12% for serviced.
- A4.4 Regional surveys indicate that occupancy levels on Exmoor are similar to those in the rest of the South West throughout the peak months but are substantially lower for serviced accommodation in the winter months – see tables 4&5 and figures 4&5. The regional figures will include business related and urban tourism figures that are likely to be less markedly seasonal.

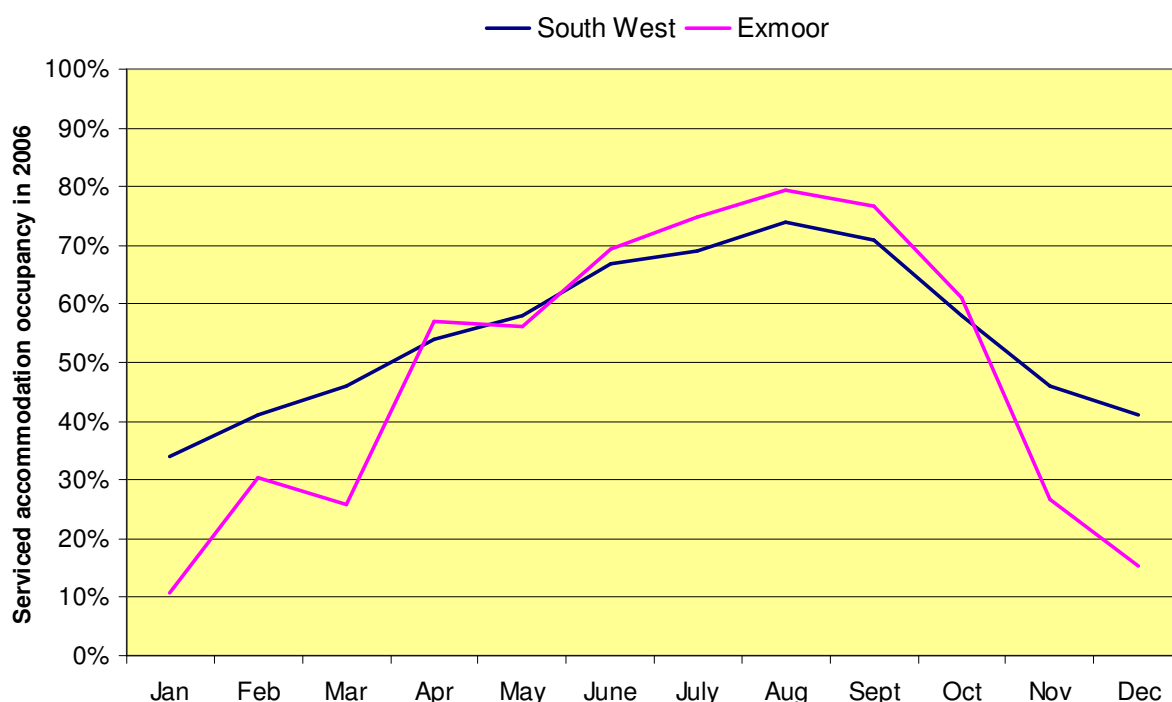
**Table 4 – Comparison of room occupancy for serviced accommodation in 2006**

	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
South West*	34	41	46	54	58	67	69	74	71	58	46	41
Devon*	31	38	44	52	55	67	68	75	71	59	43	39
Somerset*	36	37	41	53	54	58	59	63	64	56	46	41
Exmoor**	11	30	26	57	56	69	75	79	77	61	27	15

\* Data from South West occupancy survey – South West Tourism

\*\* Data from Exmoor occupancy survey 2008 – Global Tourism Solutions Ltd

**Figure 4 – Comparison of occupancy levels on Exmoor and South West region for serviced accommodation in 2006**



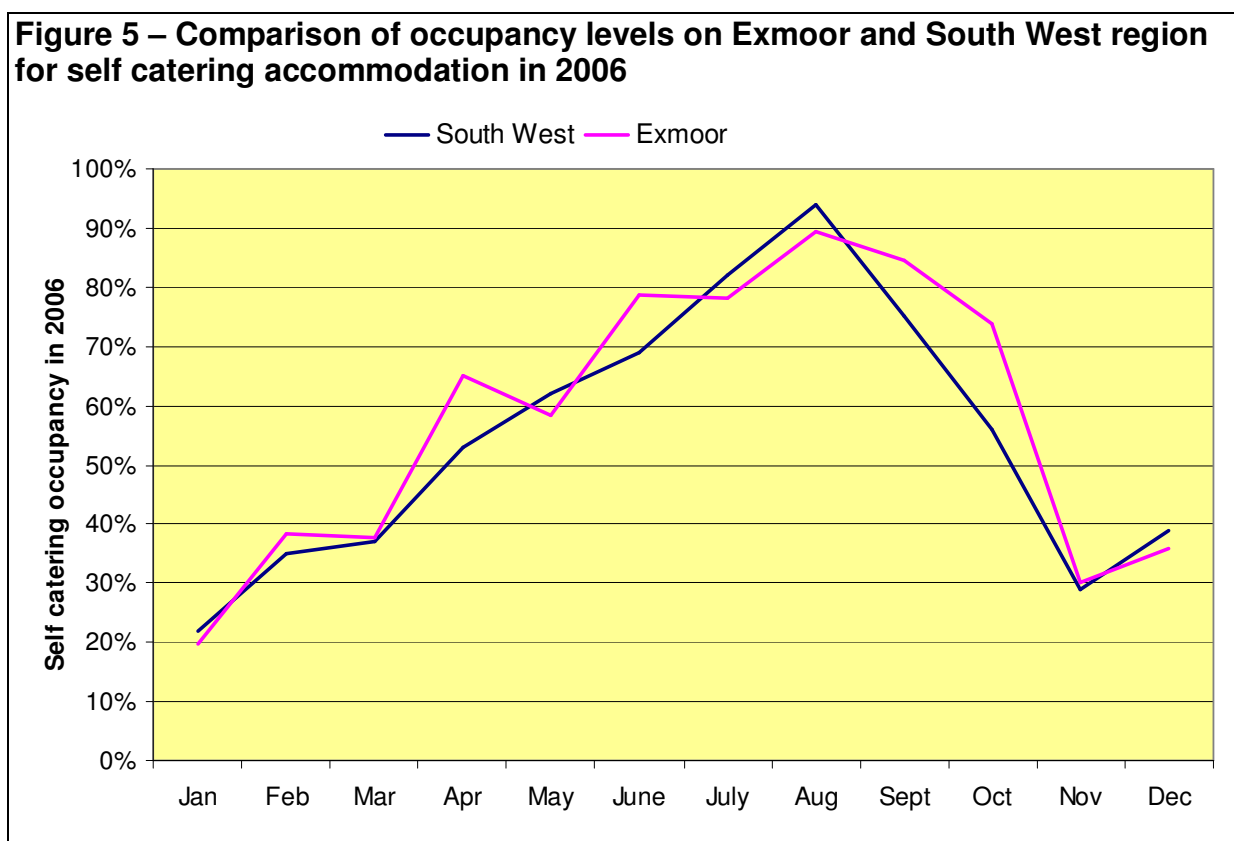
**Table 5 – Comparisons of occupancy levels for self-catering accommodation in 2006**

	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
South West*	22	35	37	53	62	69	82	94	75	56	29	39
Somerset*	30	38	39	65	66	76	81	93	88	67	44	42
Exmoor**	20	38	38	65	58	79	78	89	85	74	30	36

\* Data from South West occupancy survey – South West Tourism

\*\* Data from Exmoor occupancy survey 2008 – Global Tourism Solutions Ltd

**Figure 5 – Comparison of occupancy levels on Exmoor and South West region for self catering accommodation in 2006**



A4.5 In addition to the occupancy survey mail-out, face-to-face interviews were conducted during February and March 2008 with a number of accommodation providers representing a cross-section of the accommodation available within Exmoor National Park. The survey is presented in section B.

A4.6 Evidence from accommodation providers offering B&B indicates that many of them are working at full business capacity during the busiest months even though they may not be 100% full: the majority are micro businesses, employing no staff and the level of business at the height of the season can be exhausting for them. Self-catering, on the other hand, is generally less labour intensive and 100% occupancy rates are a target for some. Five of the twelve business owners felt that they had sufficient business, with only one looking for 100% occupancy.

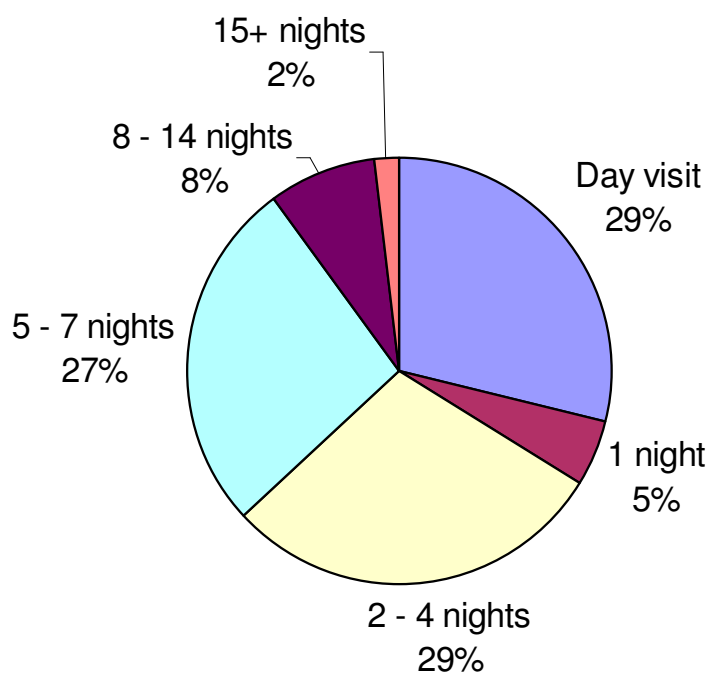
#### ***Length of stay and booking patterns***

A4.7 Accommodation providers reported an increase in late bookings, mostly attributed to the ease of researching and booking accommodation via the internet. Most self-catering properties now offer 3 or 4 day breaks as well as

full week holidays, as the demand for short breaks continues. The increase in late bookings is particularly marked for self-catering cottages and apartments which were traditionally booked in January for any time later in the year. Although forward bookings are still the norm the bookings are often less far in advance.

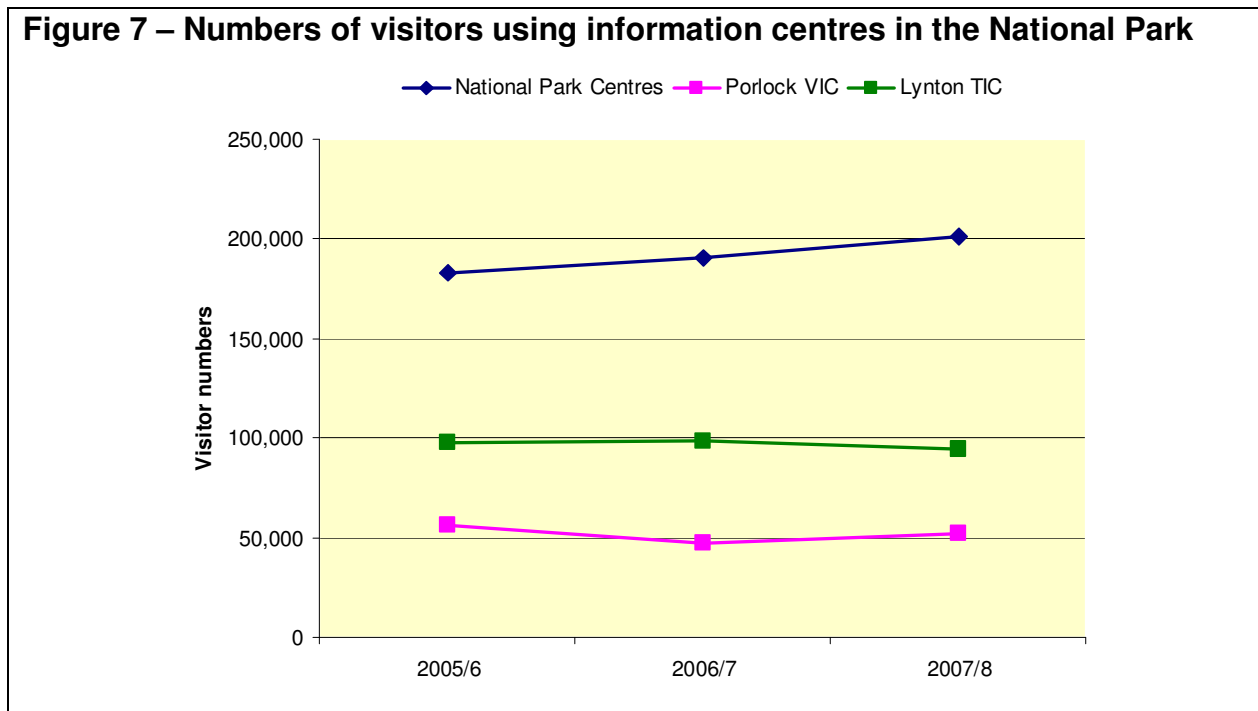
A4.8 Two week bookings are now a rarity for most accommodation providers, but self catering properties still have a high percentage of one week bookings. The survey of visitors in 2005 showed similar results (figure 6) and 29% of those interviewed were on a day visit; 27% were staying in hotels and other serviced guest accommodation; 19% caravanning or camping, and 17% staying in self-catering properties. The visitor survey showed 29% were taking a short break of 2 – 4 nights, and 27% of visitors were staying 5 – 7 nights.

**Figure 6 – Length of stay based on visitor survey in 2005**

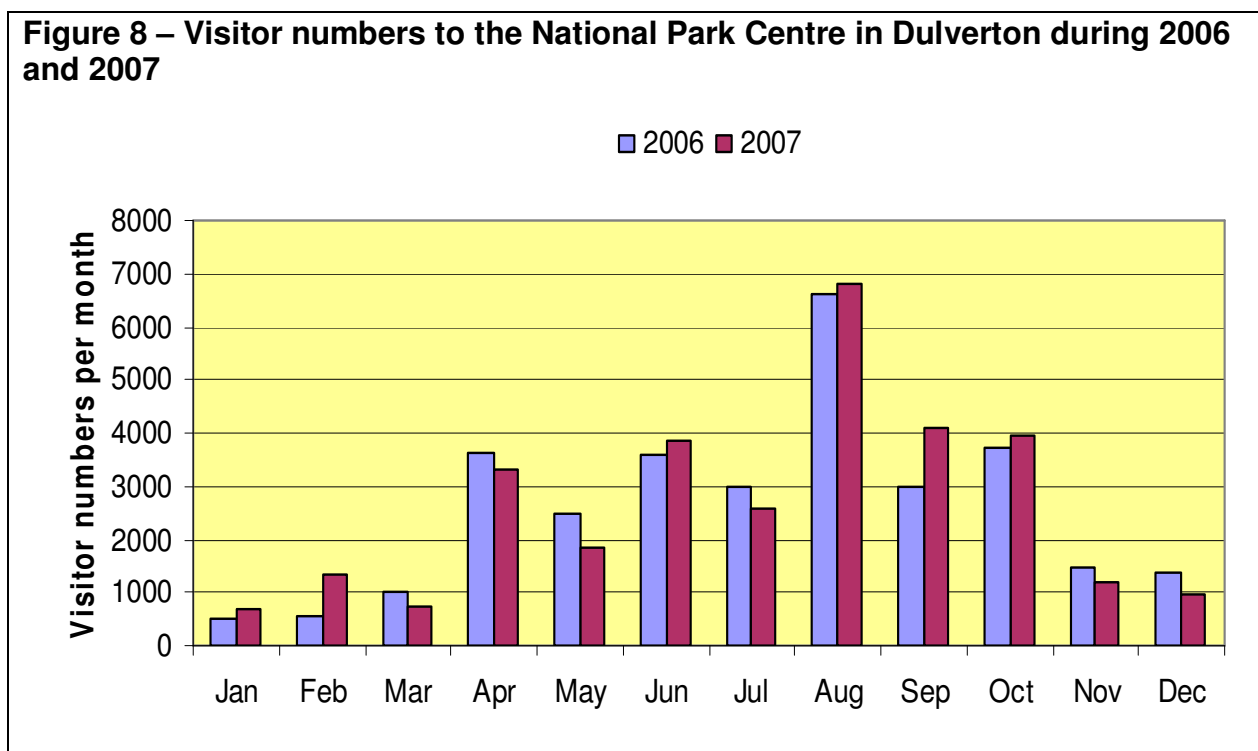


## A5 Visitors to information centres

A5.1 Over the last three years the number of visitors to information centres has been fairly stable. Figure 7 shows Lynton Tourist Information Centre, Porlock Information Centre and the combined visitor numbers for all the National Park Centres run by Exmoor National Park Authority.



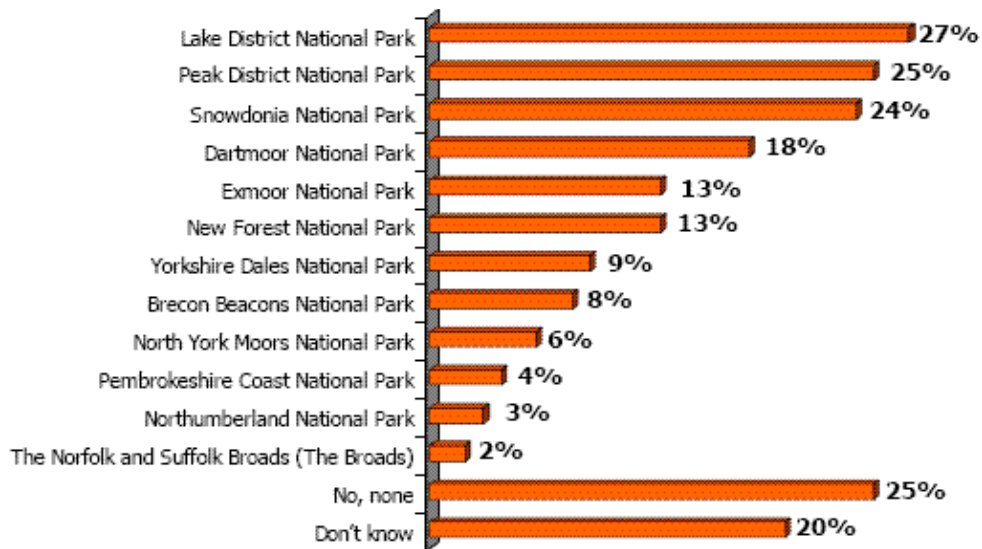
A5.2 An example of the number of visitors to National Park Centres by month is shown below; this shows visitors to Dulverton which is open all year, with shorter opening hours in the winter months.



## A6 Awareness of Exmoor National Park

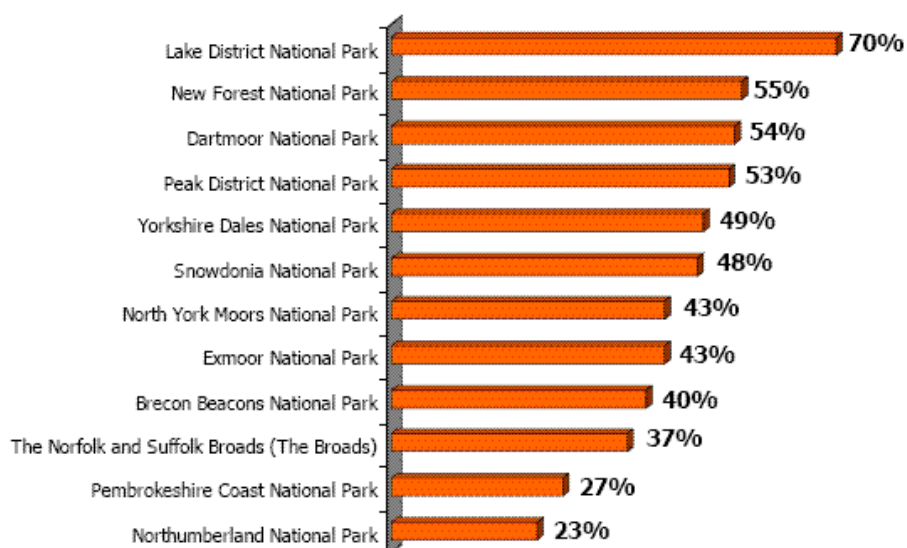
- A6.1 In June 2007 a National Parks Awareness survey was carried out by GfK NOP Social Research on behalf of the Association of National Park Authorities. This was a telephone survey of a sample of 1000 adults which explored awareness of National Parks in the UK, attitudes and experiences.
- A6.2 87% of those questioned had heard the term “National Parks”. Unprompted awareness of individual National Parks was relatively low: all respondents were asked if they could name any National Parks in England or Wales. 13% named Exmoor, which is a 2% increase since a similar survey in 2001.

**Figure 9 – Public awareness of National Parks in England and Wales (unprompted) (GfK NOP, 2007)**



- A6.3 As a follow up question respondents were asked which National Parks they had ever visited from a list read out to them. Exmoor performed well when compared to the other more “remote” National Parks which are not near large urban areas or motorways.

**Figure 10 – National Parks ever visited (GfK NOP, 2007)**



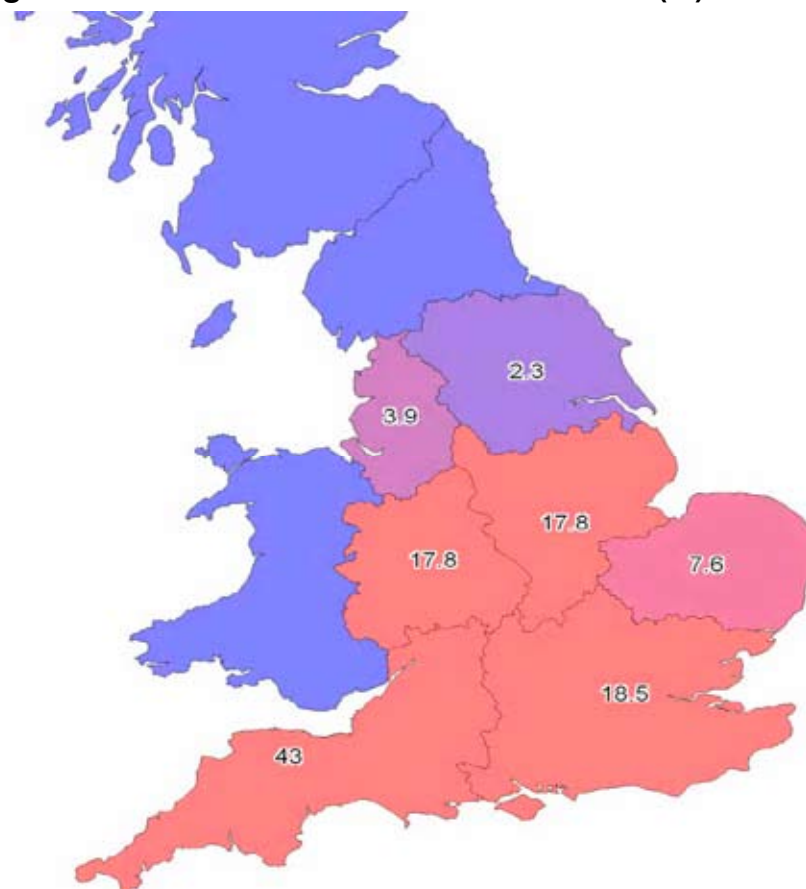
## A7 Visitor Profile

- A7.1 Between June and December 2005 a group of interviewers carried out 1663 face to face interviews of visitors to Exmoor. Seven main locations were chosen where visitors were most likely to be found and seven supplementary locations were also used to provide opportunities to interview people “off the beaten track”. At the end of each interview respondents were given another questionnaire and asked to fill it in later and return it in a reply paid envelope. 530 of these self completion surveys were returned: a 31% response rate.
- A7.2 The 2005 visitor satisfaction survey asked a number of questions relating to who visits the National Park and what motivates them to choose Exmoor. 99% of visitors were here for leisure purposes. 80% were repeat visitors, with 20% visiting more than four times a year. 89% planned to visit the area again, with 8% being undecided.

### *Origin of visitors*

- A7.3 People come from all over the country: 62 different UK counties were represented in the sample. 43% came from the South West, 18.5% from London and the South East and 18% from the Midlands. 4.8% were from overseas, from 20 different countries. Interviews with accommodation providers early in 2008 report a similar picture: most had guests from all over England, some from all over the world, but generally they came from no further afield than the West Midlands. They reported an increase in visitors from Bristol and visitors from Wales were also increasing in numbers.

**Figure 11 – Origin of UK visitors to Exmoor National Park (%)**

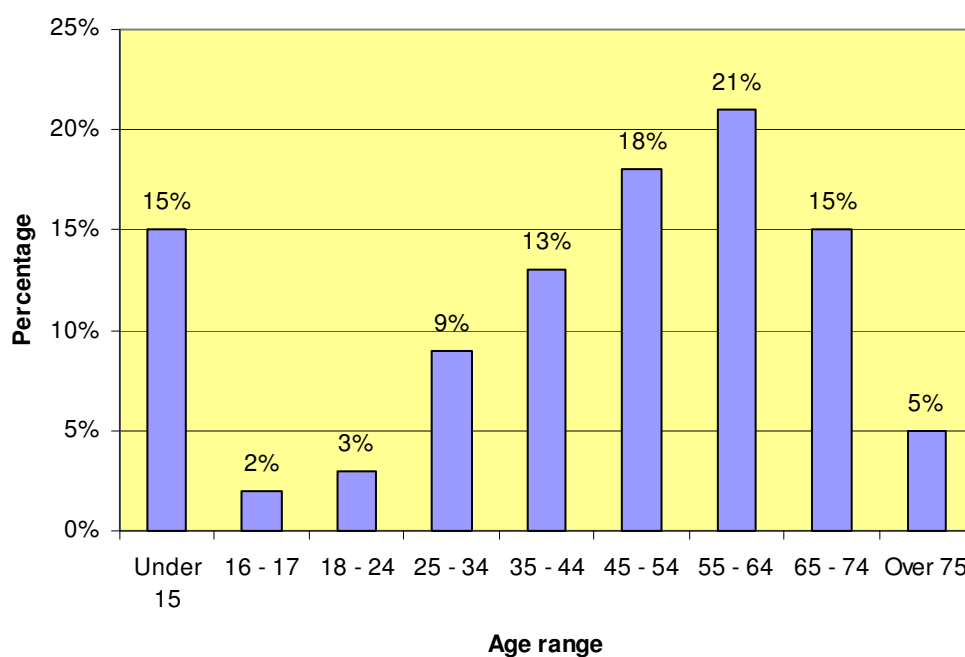


### *Age profile of visitors*



A7.4 The respondents were asked about the ages of all the people in their group. The total number of people included in this question was 2679 and the results are shown in figure 12. In the 2005 survey, 11% of visitors were aged 15 or under. Table 6 excludes these respondents in order to enable a comparison to be made with age profile from similar surveys in the 1980s.

**Figure 12 – Age profile for visitors from the 2005 visitor survey (Visit Exmoor / QUEST)**



**Table 6 – Age profile for visitors aged 16 and above from the 2005 visitor survey compared to similar surveys in the 1980s**

<i>Age group of respondents</i>	<i>1980</i>	<i>1981</i>	<i>1982</i>	<i>1983</i>	<i>1987</i>	<i>2005</i>
15/16-24 years*	4%	10%	10%	10%	9%	6%
25-44 years	40%	37%	53%	42%	48%	26%
45-64 years	42%	33%	26%	34%	31%	45%
65+ years	14%	20%	11%	14%	12%	23%

\*Surveys in 1980s counted ages 15 to 24 while the 2005 survey referred to under 15s and 16-17 etc.

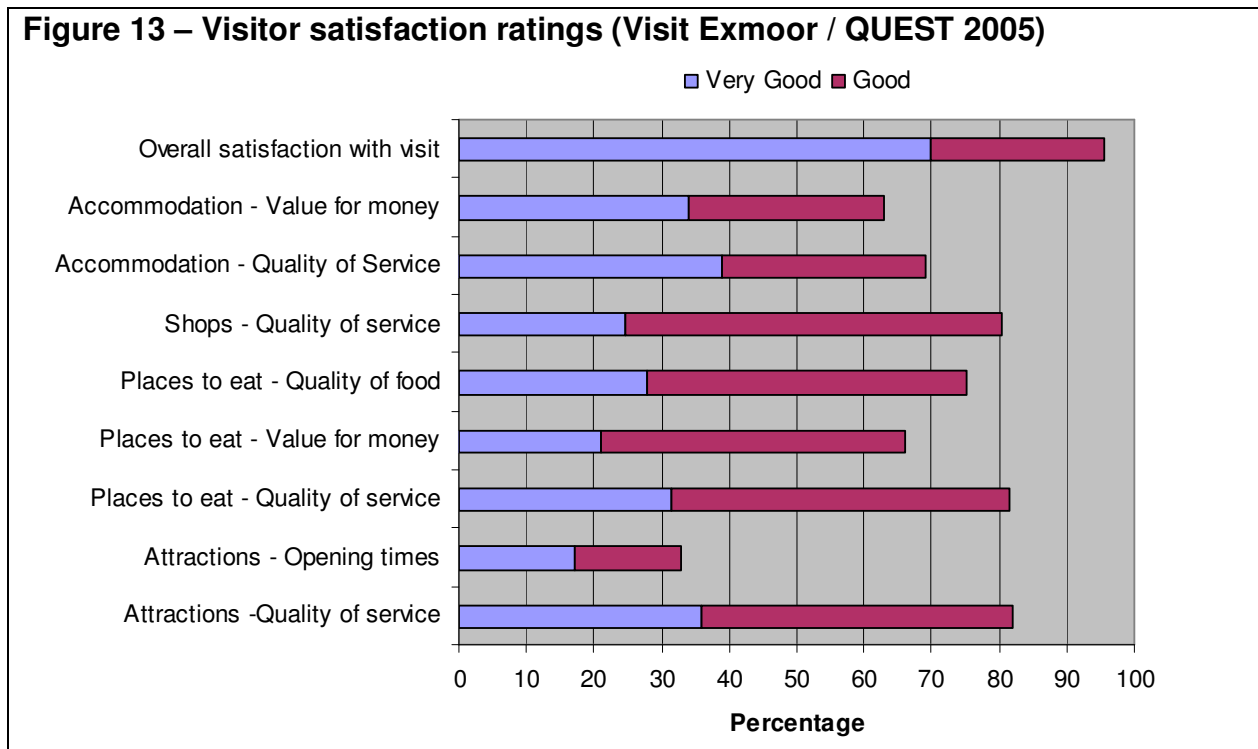
A7.5 Table 6 hints that, compared to surveys in the 1980s, the age profile of visitors to Exmoor National Park has increased and the percentage of over 45s has increased while the percentage of 25 – 44 year olds has decreased considerably. The survey methodology was slightly different in the 1980s and conclusions cannot be drawn with certainty but this is an aspect of the visitor profile that would merit further investigation.

A7.6 Interviews with accommodation providers in 2008 indicated that most of their visitors were over 40, but they also reported an increase in younger people (in their 20's and 30's) wanting a break from city life.

## A8 How visitors view Exmoor

### Visitor Satisfaction Survey – Summary of findings from 2005

A8.1 The 2005 visitor survey asked a number of questions to determine how visitors spent their time here and how happy they were with a number of aspects of their visit. 96% of respondents rated their overall satisfaction with their visit as very good (70.4%) or good (25.5%). The cleanliness of the countryside also scored very highly with 95% rating it as good or very good. Figure 13 demonstrates the overall levels of satisfaction expressed with a variety of aspects of the visitor experience in the National Park.



A8.2 The aspects of the visitor experience which were rated as very good or good by over 80% of visitors were:

- Quality of service at visitor attractions, places to eat and drink and shops
- Ease of finding their way round using road signs
- The cleanliness of the towns
- Quality and usefulness of the Exmoor Visitor Newspaper
- The welcome and usefulness of information at National Park Centres

A8.3 Aspects rated as good or very good by over 70% of visitors were:

- Quality of food
- Quality of service at accommodation
- Public rights of way signage
- Display maps and information boards
- Ease of parking
- Condition of footpaths and bridleways
- Speed of service at Visitor Centres

A8.4 Aspects rated as good or very good by over 60% of visitors were:

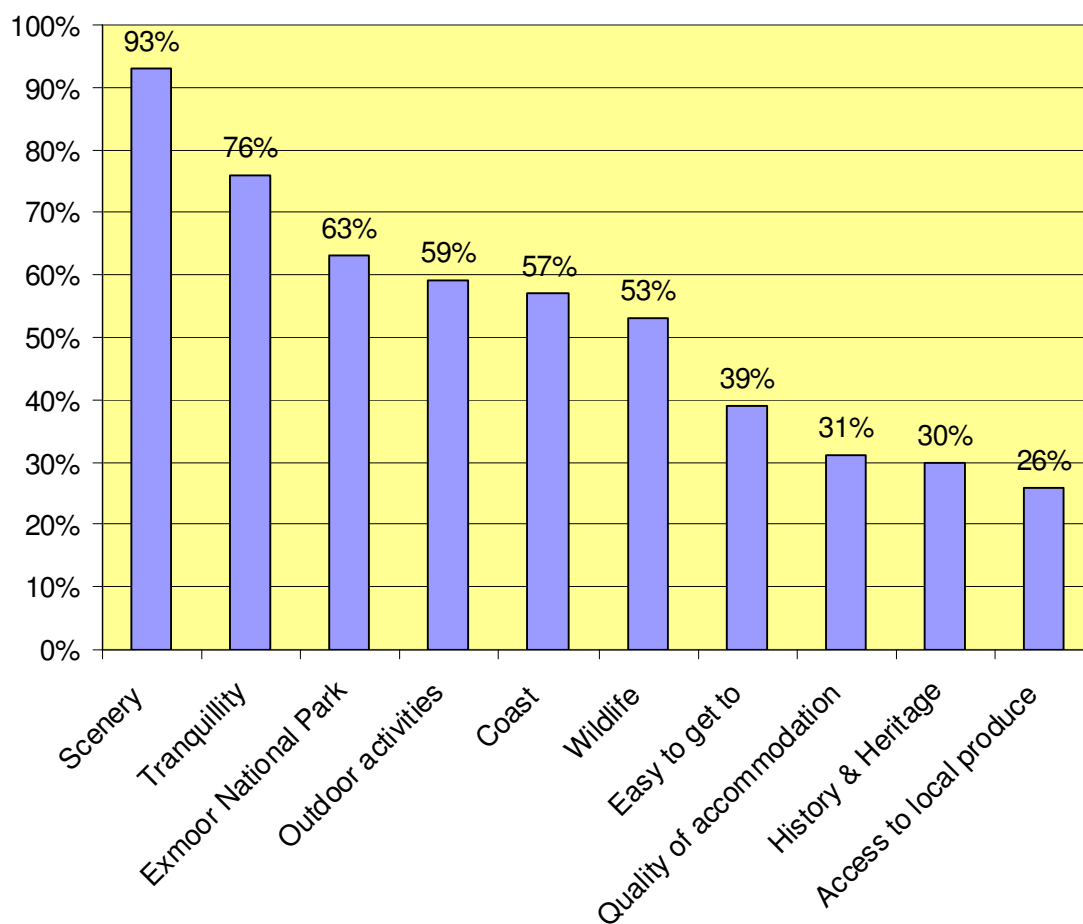
- Value for money at visitor attractions
- Opening times at visitor attractions
- Value for money at places to eat and drink
- Food service times
- Opening times of shops
- Value for money at accommodation
- Pedestrian signs
- Availability and cleanliness of public toilets
- Picnic sites

A8.5 The cost of parking and the ease of getting to and around the area were the only areas where less than 50% found it to be good or very good.

### ***Reasons for visiting Exmoor National Park***

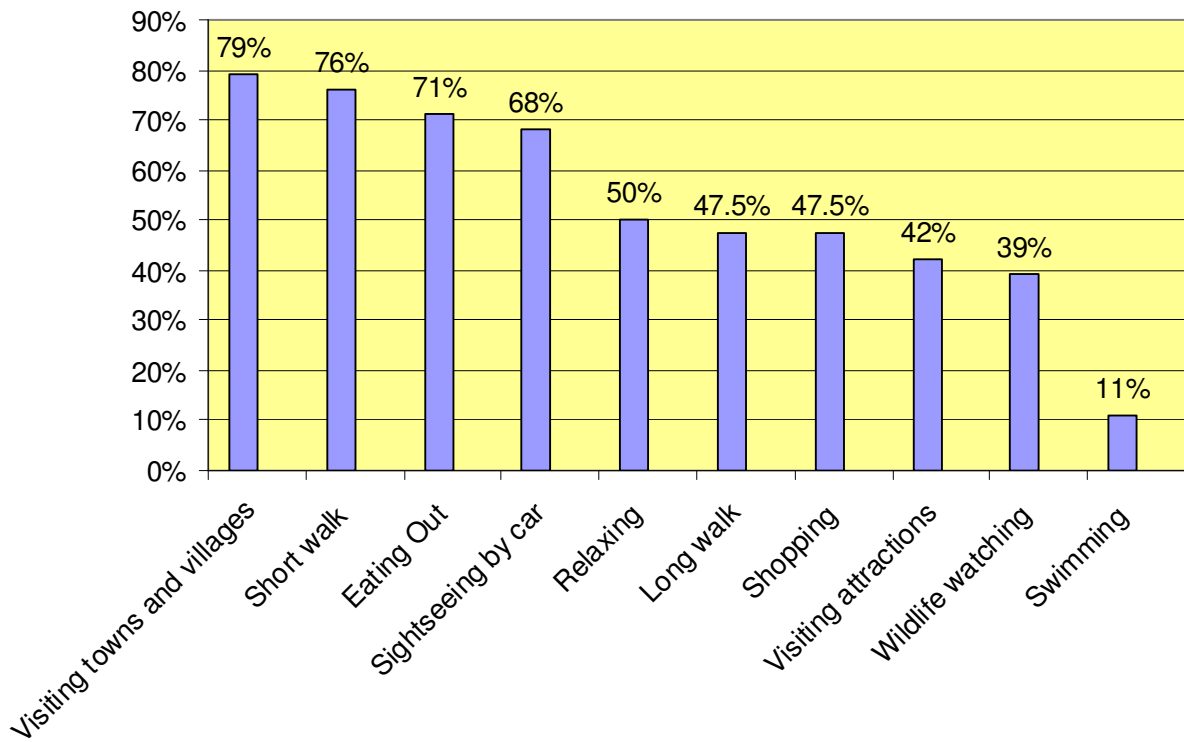
A8.6 Figure 14 sets out the top ten aspects that were cited by visitors in the 2005 survey as being most important to when deciding to visit Exmoor.

**Figure 14 – Top ten reasons for visiting Exmoor (Visit Exmoor / QUEST 2005)**



A8.7 Figure 15 indicates the most popular activities undertaken during a visit to the National Park.

**Figure 15 – Top ten activities undertaken by visitors to Exmoor National Park (Visit Exmoor / QUEST 2005)**



A8.8 In the 2008 survey, accommodation providers reported that their guests were attracted to Exmoor for walking, riding, fishing, peace and quiet, cycling, mountain biking, shooting and escaping the stresses of daily life. When they were here they walked, although there has been an increase in those that come to walk and then find it too difficult, so go sightseeing by car instead. They fished, went riding and mountain biking, explored the towns and villages and relaxed.

## A9 Local perceptions of tourism

A9.1 Exmoor National Park Authority commenced a review of the National Park Management Plan in 2005. Public consultation took place from April to August 2006 and a summary of the results can be found in the Management Plan. 73% of respondents living in the National Park agreed with the statement “I would not object if visitor numbers in Exmoor National Park increased by 25% compared to current levels”. Table 7 provides a selection of other responses from the Management Plan consultation

**Table 7 – Summary of responses received to the Exmoor National Park Management Plan consultation on tourism and recreation in 2006**

<b><i>National Park Management Plan consultation responses on tourism and recreation</i></b>	<b><i>Net agree all</i></b>	<b><i>Net agree those living in the National Park</i></b>	<b><i>Net agree those living outside the National Park</i></b>	<b><i>Net agree those under 55 years old</i></b>	<b><i>Net agree those 55 years old and older</i></b>
<b><i>Statement</i></b>					
I support an increase in the following activities in the National Park where they help attract visitors and provide income to local businesses: Wildlife safaris / wildlife watching	86	91	80	83	84
I support an increase in the following activities in the National Park where they help attract visitors and provide income to local businesses: Equestrian trails, courses and events	71	76	62	64	69
I support an increase in the following activities in the National Park where they help attract visitors and provide income to local businesses: Small camping sites [fewer than 10 pitches]	70	72	79	85	69
I would not object if visitor numbers in Exmoor National Park increased by 25% compared to current levels	65	73	57	62	64
I would like to see more safe cycle routes in the National Park that can be used for cycling by families with young children and inexperienced cyclists	61	56	62	73	52
I would like to see more effort at increasing the number of visitors outside of the peak times in July and August	59	66	32	52	43
I think that every effort should be made to increase the length of bridleways in the National Park	54	44	62	50	50
If it were possible, I would like all recreational 4x4 use stopped on unsurfaced routes that are currently designated as RUPPs [Roads Used as Public Paths], BOATs [Byways Open to All Traffic] and County Roads	45	65	71	65	73

<b><i>National Park Management Plan consultation responses on tourism and recreation</i></b>	<b><i>Net agree all</i></b>	<b><i>Net agree those living in the National Park</i></b>	<b><i>Net agree those living outside the National Park</i></b>	<b><i>Net agree those under 55 years old</i></b>	<b><i>Net agree those 55 years old and older</i></b>
<b><i>Statement</i></b>					
I support an increase in the following activities in the National Park where they help attract visitors and provide income to local businesses: Mountain bike courses	33	27	7	48	22
I would like to see open access on horseback on moor and heath land that has recently been designated for open access on foot	32	36	17	20	27
I would like to see better promotion of mountain bike routes	23	14	6	48	-5
I think the public authorities should provide money to promote Exmoor National Park and increase visitor numbers	8	7	14	22	5
I would not object if visitor numbers in Exmoor National Park increased by 50% compared to current levels	-17	-14	-46	-26	-36
I think that the number of visitors to Exmoor is about right already	-17	-24	10	-4	0
I support an increase in the following activities in the National Park where they help attract visitors and provide income to local businesses: Sites for caravans/camper vans	-19	-13	-16	-19	-13
I support an increase in the following activities in the National Park where they help attract visitors and provide income to local businesses: Large camping sites [more than 10 pitches plus new buildings]	-44	-48	-48	-45	-47
I support an increase in the following activities in the National Park where they help attract visitors and provide income to local businesses: 4x4, Quad bike and motor bike trails and events	-48	-60	-85	-66	-77
I would prefer it if there were fewer visitors to Exmoor	-65	-56	-62	-61	-60
I currently use public transport in Exmoor National Park at least once a week	-66	-73	-89	-77	-85

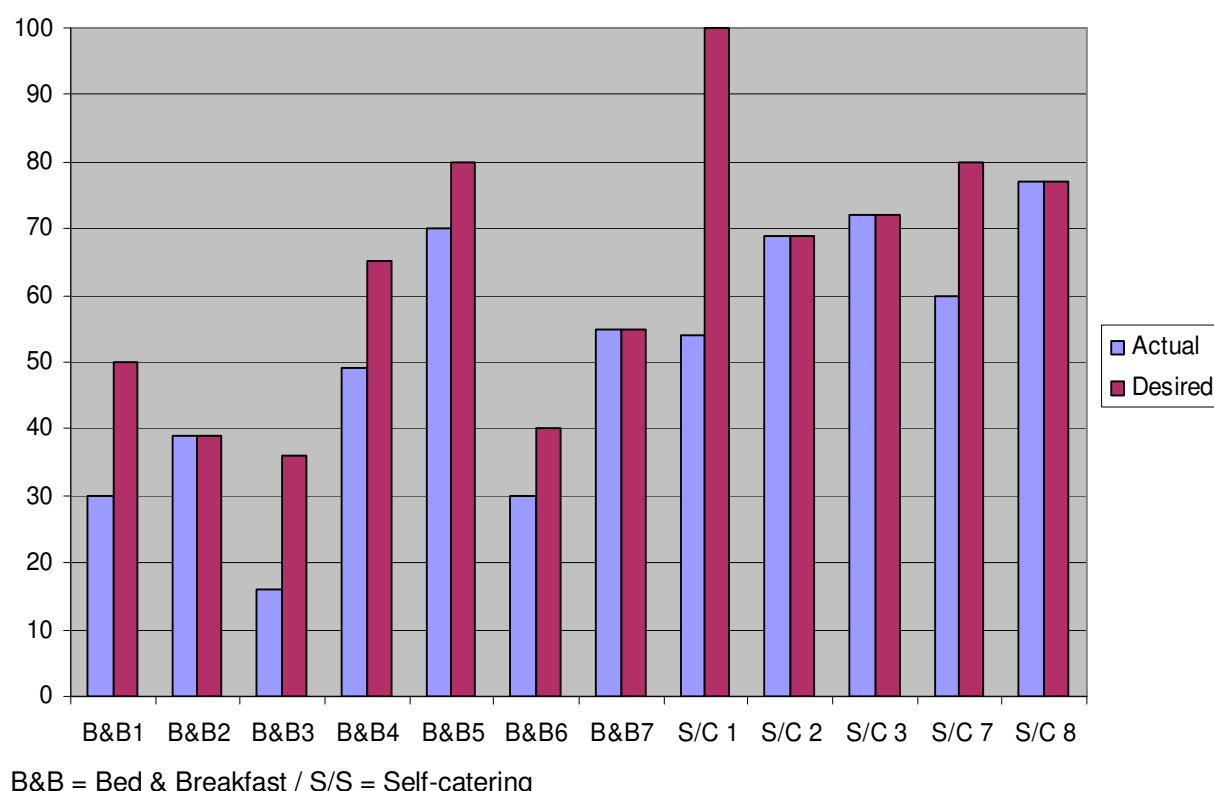
## Part B – 2008 Survey of Exmoor tourism businesses

B1.1 During January to March 2008 seventeen tourism businesses were surveyed using a standard interview (shown in Appendix 3). The businesses were a mixture of self-catering (both single and multiple cottages), B&Bs (large and small), Farm B&Bs, Inns, campsites, touring sites and static caravan sites and were spread across the coastal strip and the inland settlements. The owners had all been running the business for at least 3 years and were a mixture of locals and people who had moved into the area. The following tables and text summarises the responses expressed during the survey interviews.

### ***Business capacity and performance***

B1.2 The survey interviews looked at when the busiest times were, when business owners feel they have spare capacity and if they are actively seeking more business (see table 8). Although the overall average percentage occupancy for any year is well below full occupancy, levels in the peak season are good. Evidence from accommodation providers offering B&B indicates that many of them are working at full business capacity during the busiest months even though they may not be at 100% occupancy: the majority are micro businesses, employing no staff and the level of business at the height of the season can be exhausting for them. Self-catering, on the other hand, is generally less labour intensive and 100% occupancy rates are a target for some. Figure 16 shows actual occupancy levels compared to the levels aspired to by a selection of business owners interviewed. Five of the twelve business owners felt that they had sufficient business, while seven were seeking increases in occupancy, with only one looking for 100% occupancy.

**Figure 16 – A comparison of actual occupancy levels with desired occupancy levels for 12 tourism accommodation business in Exmoor National Park for 2007**





- B1.3 The survey indicated a general concern that profits were falling despite increasing prices, so visitor numbers would need to increase for the businesses to remain viable. Many of them would welcome a more even spread of visitors across the year and the need for more business in the spring to get the season off to an earlier start was mentioned. Reducing costs is also likely to be important, particularly in areas such as energy and fuel use where costs are increasing rapidly and where reductions will have environmental benefits.
- B1.4 Some thought the possibility of year round business was unlikely and were happy to tick over in the quieter months with more time for themselves and for maintenance and improvements. In this sample only one business closed completely during the winter months. Approximately 8% of all known accommodation stock in the National Park closes in the winter months.
- B1.5 For the small sample of in-depth interviews, although annual occupancy ranged from 30% to 72%, the April to October months averaged out at in excess of 55% for serviced and in excess of 75% for self-catering. Most businesses reported a gradual increase in occupancy rates over recent years and stressed that business did fluctuate over the years and was very weather dependent. The trend towards late bookings also means that business is being increasingly affected by weather forecasts.

### ***Business marketing***

- B1.6 Accommodation providers were asked what marketing they carry out and what works for them. All but one of the respondents reported that that they were increasingly seeing the internet as their most valuable marketing tool. Out of 17 businesses, only one relied almost exclusively on passing trade, referrals from the local visitor centre and repeat visitors (and was not happy with the level of business this brought). See tables 9a and 9b
- B1.7 Fifteen had their own website and these were usually optimised to gain the best results from the search engines, one had a webpage on the local visitor centre website. Most advertised their websites on other websites, locally and nationally. Traditional brochure advertising was still successful for some but the majority of bookings were thought to be generated by internet advertising and, for two of the self-catering cottages, through agencies. Most printed brochures now offer an on-line site as well. Internet advertising was seen to be a much more cost effective alternative to placing adverts in brochures or magazines. Accommodation providers who attracted guests from overseas usually actively promote their accommodation in brochures and websites which target overseas markets.
- B1.8 Repeat visitors were an important source of business for all those interviewed. Estimates of the percentage of guests staying each year who had stayed before ranged from 33% to 95%. Offering a good quality experience, so that guests would return and/or recommend to friends, was seen as an important part of the businesses own marketing strategy.

### ***The impact of events and activities on occupancy***

- B1.9 Businesses were asked about the impact of local events on their occupancy levels. It seems to be very dependent on the event location, with businesses very close to the event benefiting, but there was little impression that events attract staying visitors across the whole area. For example, Dunster by Candlelight fills the whole village, but was only mentioned as a source of guests by one business outside Dunster. The Golden Horseshoe was mentioned by

all three businesses which provided stabling as being good for business. None of those interviewed had anyone stay for the Tour of Britain cycle race but those who saw it thought it was good for raising awareness of Exmoor. The Ironman triathlon which attracts over 1200 competitors fills the accommodation in the villages close to Wimbleball Lake and athletes stay as far away as Wheddon Cross and Dunster.

B1.10 Most of those interviewed agreed that events and festivals were good for the area: adding to the atmosphere and raising awareness outside the area but felt that most of them didn't attract many additional staying visitors.

B1.11 A survey carried out at Snowdrop Valley in 2008 showed that it attracts visitors from a wide area. The survey showed visitors were mainly from Somerset and Devon (74%), with the rest from the Midlands, South East, Dorset, Sussex, Hampshire, Worcestershire, Wales and London. 19% were staying in the area, 10% in the National Park with at least one hotel offering Snowdrop Valley breaks. Research carried out by the Events and Festivals Officer show that the seven festivals funded by the project from July 2004 to October 2007 were attended by an estimated 47,700 people.

B1.12 In 2007 Porlock visitor centre co-ordinated a themed weekend around the deer rut in the autumn. It was a great success, attracting national publicity, selling all 36 available places and bringing in £7,500 directly to local businesses. Only two of those attending had ever been to Exmoor before and the event could have sold more places but it was kept small to have a minimal impact on the deer. They plan to repeat this as an annual themed weekend and develop more breaks along similar lines.

B1.13 The following responses were received to the question "Do events and activities boost bookings?":

#### **Serviced**

- Not particularly
- Full for Porlock Rutting weekend. Nothing from Ironman. Nothing from Tour of Britain. Nothing for Dunster by Candlelight. Events need to be close to the accommodation for the accommodation to benefit.
- Dunster by Candlelight is very good. West Somerset Steam Gala. Exmoor Food Festival brings in business. Nothing from Ironman. 1 booking for Exmoor Beast. Have had an increasing number of walkers and a small increase in cyclists.
- The best is the Golden Horseshoe. Do well from Ironman and have some from Dunster by Candlelight.
- None
- Ironman has had a big impact – they could let their rooms 10 times over for the event.
- Events are normally at weekends and they are full at weekends. Nothing from Tour of Britain but it was a fantastic day.

#### **Self-catering**

- Always full for Golden Horseshoe. Full for Ironman. A lot of events are in the peak season when they are full anyway – any new events should be in the shoulder season, early spring would be good.
- Full for Ironman.
- Tour of Britain was great for 15 minutes but didn't bring in any business. Nothing from Ironman. No one has stayed specifically for an event.
- No, people don't come especially for events

- Lynton & Lynmouth Music Festival fills the campsite. Doone Run brings campers. No one for Tour of Britain.
- Team building events. Not many come for different activities other than walking and cycling.
- Ironman has been very good – athletes and their families, not spectators. Nothing from Food Festivals or Tour of Britain.
- Golden Horseshoe is good, had one booking for Ironman.

### ***Awareness of climate change***

B1.14 All of those interviewed were taking positive actions to run a more sustainable business, appreciating the need to reduce CO2 emissions and the financial advantages of reducing energy consumption. 14 of the 16 questioned said that they recycled and 8 used low energy bulbs. 8 used local produce and 7 of those were in Somerset, 2 businesses in Devon mentioned that sourcing local produce was a problem. They all said that 99% of their visitors arrived by car and several commented that their properties were very difficult to get to without a car. They do encourage guests to leave the car behind when they go out for the day, which many do as they are here to walk. Those living near public transport encouraged guests to use it.

B1.15 Responses included:

#### **Serviced:**

- 95% of light bulbs are low energy. New boiler last year increased efficiency hugely. 70% of food is purchased locally. Guests respond extremely well to local produce.
- They have always recycled and are very conscious of waste. Ask guests to leave out recyclables. Have an environmental policy for guests. Buy local food. Have lots of local books, maps and guides for guests and advise on local routes. Encourage them to use local bus but they always go off in their own cars.
- Provide local produce breakfasts. Have always recycled.
- Use low energy bulbs, use local produce, compost food waste, collect rain water, recycle, keep details of local bus timetables – all as a result of ENPA green awareness training
- Converted a lot of lights to low energy, lagged the water system and roof space, ask guests to only put towels out for washing if they want to, recycle (but paying for commercial waste pick up is off-putting). Use local produce, all meat is from Exmoor, local eggs, only use vegetables in season – guests appreciate it and more and more are looking for it.
- Yes. Attended green awareness training, which made her more aware but needs more technical advice. Needs advice on water efficiency. Assesses energy costs. Struggling to find local produce.
- Recycles a lot and encourages guests to recycle. Gradually changing all light bulbs to low energy. Uses eco friendly products. Uses all local produce, some of it home grown. Local books, guides, etc for guests.
- Recycle paper, glass, cardboard and garden waste. Use low energy bulbs. House is well insulated, double glazed and has an efficient hot water system. Don't use local produce as it's not commercially viable: too expensive, no continuity of supply and wouldn't know where to start sourcing locally.

### **Self catering**

- Has always recycled. Would like to be able to recycle plastics but can't. Energy saving bulbs, insulation, double glazing. Log burners in the cottages use wood from hedge laying. Would like to see ENPA providing grants and planning permission to allow people to use small scale hydro-power.
- Have information on local places and try to encourage guests to explore the local area. No public transport where they are. Recycle and encourage guests to recycle. Composting. Low voltage lighting. Cottages are well insulated with very efficient double glazing.
- Have always recycled everything. Have a recycling area for guests. Compost their own and guests kitchen waste. Encourage guests to leave the car behind, lots come to walk anyway and don't use the car when they are here. Provide guests with a welcome pack of local produce: eggs, bread, honey, milk, apple juice.
- Attended green tourism workshop which focused them although they were doing a lot of the things already. Energy saving lightbulbs, collect rainwater, encourage guests to use the bus. Recycle.
- Recycle. Use chemicals sparingly. Always buy local, use local labour and local resources. Visitors arrive by car and then walk.
- Recycle as much as possible. Encourage use of public transport.
- Recycle and have separate bins for guests to recycle. Have private water and drainage, 4 of the cottages have wood burning stoves and they provide the wood. They have marked out farm walks. Economical with fuel, mainly to save money – low energy light bulbs, sensor switches in the laundry and games room. Very difficult to get to them without a car.
- Recycle glass, tin, paper and cardboard. Household waste is composted. Would use energy saving bulbs if they were more user-friendly (take too long to warm up and worried about safe disposal). Cottages are well insulated and have wood burning stoves.

### ***How tourism accommodation businesses view being in the National Park***

- B1.16 When asked to comment on how important it is to their businesses that they were in a National Park most had strong opinions and they were mainly very positive. Difficulties with planning regulations led one owner to see it as a distinct disadvantage for their equine-related business. People saw it as an important reason for people to come to the area and something that gave potential visitors confidence. One self-catering business persuaded his holiday booking agent to include an Exmoor section on their website, rather than the usual county-based listings, as he saw that as a much more attractive proposition than Somerset.
- B1.17 Virtually all of the accommodation providers highlight the fact that they are Exmoor National Park in their advertising, websites and information material provided to guests. They use the special qualities, particularly the landscape and tranquillity, to attract visitors. Most were keen to pass on their knowledge of the area to their visitors and those who had attended the National Park Authority's Exmoor Awareness seminars had found them extremely useful in extending their own knowledge which they could then pass on to guests.
- B1.18 Responses to the question, "How important is it to your business that you are in a National Park?" included:
- Serviced**

- Very important
- Very
- Very. The customer understands and has confidence in Exmoor National Park far higher than for Somerset or North Devon.
- Very important because of the type of people who visit: generally country loving people that like the rural community and National Parks. Being in the Park gives them the type of people they like to have as guests.
- They have no choice! Visitors often don't know it's a National Park and the word moor is scary to some people, conjures up images of bogs and getting lost.
- More benefits than not. Exmoor is getting better known.
- Used to think it was important but now not as important.

### **Self-catering**

- It's the worst possible move they could have made: the planning laws are draconian and unrealistic. The Park Authority doesn't want people to live on Exmoor, they make it so difficult to live and work here.
- It is important. They are very proud to be in the National Park and it is important to their business. Psychologically it's important to visitors.
- They are here because of Exmoor, not necessarily the National Park, but that is a hook to hang it on. The business works because it's Exmoor; it's by the sea and close to a village with pubs, shops, food, etc. The proximity to the village is the important bit for guests. It is a benefit that ENPA is the planning authority and has stricter rules than some.
- Don't know. It's implicit that they are on Exmoor. It might be irritating if they ever want planning permission. The fact that it's protected is probably an advantage. Lots of misunderstanding (among guests) as to what the National Park is.
- Very. It usually comes up in conversation when people book.
- It's an important part of the area, constraining development - it's much more regulated. Rather be seen as a national park than the awful "greater Exmoor area"
- People like that. It's somewhere to go, they feel as if they have been "somewhere" and get the benefits of decent footpaths. People are attracted here by the good walking and being able to bring their dogs.

### ***Promotion of Exmoor's special qualities***

B1.19 Individual businesses are doing a lot to promote Exmoor National Park and its special qualities. All of the accommodation providers interviewed used Exmoor National Park and Exmoor's special qualities in their marketing. They all promoted the National Park in some way to their visitors while they were here, from providing books, maps and leaflets and the Exmoor Visitor for the guests to advising them on places to visit and helping to plan walking and riding routes.

B1.20 Responses to the questions, "Do you promote Exmoor's special qualities or use Exmoor National Park in your marketing? And to guests when they are here?" included:

### **Serviced**

- Yes. Knows Exmoor pretty well and has the local knowledge to pass on to guests to point them in the right direction. Tries to encourage people to get out on a boat and see the Exmoor coastline.
- Use the National Park a lot on their website, the Exmoor Awareness courses have helped with this. They only recommend places within the National Park to their guests. Directly and indirectly the Park draws a lot of people.
- Yes, on website.
- Yes, on the website and tell visitors about the National Park.
- Yes, on the website: deer, ponies, heather, views, etc. Helps plan routes for walking and riding, promote the tranquillity.
- Yes, always say it's one of the three most tranquil places in the UK, describe the landscape and wildlife. People like to have advice about where to visit from their hosts – they can have a great day out using their local knowledge.
- Uses Exmoor in their advertising.
- They sell it, but people think the Cotswolds is a National Park. AONBs are competitors. Lots of people don't know Exmoor is a National Park.

### **Self catering**

- Yes, the website says they are in the Park and they promote events on their web pages
- Use Exmoor in their address, in the brochure and website and promote it wherever they can. Promote the special qualities, lots of people come for the special countryside, the quiet and well signposted walks.
- Yes
- Yes, say they are on Exmoor and talk about the scenery, beautiful views and peace and quiet.
- It's part of their advertising, always mentioned in adverts, brochures, etc. They identify strongly with the National Park and feel protective of it.
- Yes, he knows a lot about Exmoor and promotes all of it.
- Yes, on the website and the brochure.
- Yes, on the website and in the brochure. It's a part of the country a lot of people don't know about.

### ***How accommodation businesses view the National Park Authority***

- B1.21 For many of the business owners their only contact with the National Park Authority had related to planning matters and their view of the Authority was coloured by how they felt they had been treated. For some this meant they only viewed the Authority as a Planning Authority, another layer of bureaucracy restricting their actions. For others the positives outweighed the negatives and most of those who had dealings with other officers in the Authority were very positive about their relationship with the National Park Authority.
- B1.22 There were a number of suggestions from the businesses as to how the National Park Authority could help the tourism industry. A popular request was for Exmoor National Park Authority to promote Exmoor National Park as a place to visit, raising awareness of Exmoor which would help them in their efforts to attract more visitors to their accommodation. More information leaflets for visitors, particularly highlighting what's special in the area and more information on the Exmoor National Park Authority website which would help people to plan their visits in advance.

B1.23 Several people thought the Authority should make public transport a greater priority to help to make them more sustainable. Although most thought it unlikely that people would visit without a car, visitors do like to leave the car at their accommodation and use local transport if it is available. The need to provide more short or circular walks was highlighted with many people reporting that although their guests arrive with the intention of walking, they often find it too difficult or they are afraid of getting lost, so resort to sightseeing by car instead.

B1.24 Businesses thought it would be useful if the Authority could do more to provide them with information about what is going on in the National Park which they could then pass on to their guests. An email newsletter was suggested to keep them up-to-date with the Authorities own activities as well as events, guided walks, etc. There was a request for an A4 poster of ranger guided walks that could be used on guest notice boards. Better signage from the motorways was also suggested, with the brown and white signs which currently say Exmoor, being changed to say Exmoor National Park. Generally the accommodation businesses were keen to work with the National Park Authority and can provide a valuable means of getting National Park messages across to large numbers of visitors and potential visitors if they are given the necessary information.

B1.25 Responses to the questions, "How should ENPA be working with tourism businesses, what should their role be?" included:

**Serviced**

- What they do now, plus and A4 guided walks poster for accommodation noticeboards.
- Let businesses know of events, etc., so that they can pass the information on to guests. Produce a newsletter for accommodation providers to keep them up to date with events, activities, the special qualities, cycle routes, walks
- Produce a leaflet on Exmoor that they could give to guests, or even just a bookmark with some of the Exmoor highlights on it.
- Link quality standards with sustainability
- Run the Quality Awareness Open Days again – helps build links between accommodation providers.
- It should have a promotional role in terms of PR – ENPA could link journalists with accommodation providers and help a PR agent to organise press visits.
- ENPA should hold a meeting with just tourism businesses within the Park and have an open discussion to take everyone's opinions into account.
- A brochure of accommodation within the National Park would be good.
- ENPA could be the driving force on promotion, quality, sustainability.
- Take a more active role in sustainable tourism, look at bulk buying power for things like sustainable light bulbs.
- Work with bus services and councils to make sure visitors and locals can get out and about in an environmentally friendly way.
- Have information on other Parks here on Exmoor and get other Parks to promote Exmoor. Extend it to study visits for businesses to other Parks. ENPA could organise these exchange visits.
- Spend more time on waymarks – Tarr Steps to Dulverton could be better signed.
- ENPA Centres are a great help to businesses (and of information for guests) – it would be a shame to lose them. They are a service to the businesses as well as the visitors.



- Bang W Somerset and N Devon heads together to sort out the marketing.

### **Self catering**

- Tell businesses what's going on – send out a monthly or even six monthly email to all tourism providers with news of events, etc. They would pass on information to visitors.
- Publish a list of accommodation providers on the ENPA website.
- Make people more aware of the National Park
- It's important for ENPA to be seen to be involved in what's going on in the Park – without visitors there wouldn't be a Park.
- Promote the Coleridge Bridle Way through the BHS.
- Encourage and support people who want to set up businesses
- Training – make tourism providers aware of places and what's here
- Leaflets on Exmoor : day trip itineraries within the Park
- Steer clear of listing commercial businesses – try and stand above that.
- It's not the Park's job to grade, etc., there are conventional routes to grading.
- Work to attract people here and the businesses can make the most of the opportunities and benefits.
- Start afresh and concentrate on the Park's special qualities; business will grow as a result of it.
- Difficult to say as don't want them to be too interfering.
- Exmoor Awareness.
- Be more realistic about development – get involved in trying to get an all-weather facility on Exmoor.
- More guided walks for people who aren't fit enough to walk far.
- Put the ENPA Centre where the Brass Rubbing Centre was and leave the Pavilion for something more commercial.
- It should be a partnership, most of the employment in the area is tourism related. ENPA have it about right.
- ENPA should be working with businesses not trying to lay the law down
- Bridging the gap between the people who own the land and the people who want to visit.
- It's nice to see the visitor centres operating – the more contact you have with the visitor the better,
- Grant aid to improve things like walks (on his land).
- Some form of subsidised advertising.
- The Exmoor Visitor is very good. It's good to have listings of what's happening and visitors do make use of them.
- More promotion of the area would be helpful.
- Keep the centres, visitors use the National Park Centres, especially the one in Dulverton

**Table 8 – Business survey results 1 – Business capacity and performance**

	Graded	Capacity (Months Open)	Annual Occupancy	Desired Occupancy	Spare Capacity	More businesses needed	Business Increased or decreased	% Repeat visitors	Forward or Last minute Bookings
<b>Serviced accommodation</b>									
Serviced 1	4* silver	12	30%	50%	20%	Nov, Feb, March	Increased by 5 – 6%	33%	Forward – 4 weeks
2	5* silver	11	39%	39%	0	-	Increased 14%	Increasing	Forward
3	None	12	16% (beds)	40 - 50	34%	All Year	Decreased 2%	95%	Last minute
4	5* silver	12	49%			Spring	Increased 7%	Increasing	Mainly forward
5	4*	12	65 – 70%	More		-	Fluctuates	75%	Forward 80%
6	4*	12				All year			Last minute
7	4*	7	55%	55%	0	-	Static	50%	Forward, 1m increasing
8	None	7		100%		April, June, July	Decreasing		Last minute
<b>Self catering</b>									
1	4*, 3*	12	54%	100%	46%	Nov, Dec, Jan, Feb	Static	60%	Forward
2	4*	12	69%	69%	0	-	Increased 15%		All Forward
3	4*	12	72%	72%	0	Nov, Dec, Jan, Feb	Increased 8%	50%	Varies
4	None	10				Mar, April, Oct, Nov	Changeable		Last Minute
5	3* camping	10				-	Weather dependant	40%+	Mixture
6 (camping)	None	10	36%	Same		-	Increasing	60% +	Just turn up
7	4 star	12	60%	More	40%	Outside school holidays	Static	40%	Mixture
8	4 star	12	77%	Same	0	-	Increasing		

**Table 9a – Business survey results 2 – Business marketing for service accommodation**

	<b>Graded</b>	<b>Annual Occupancy</b>	<b>Repeat bookings</b>	<b>Own Website</b>	<b>Most effective internet ads</b>	<b>Paper ads</b>
1	4* silver	30%	33%	Yes, works well	Exmoor Accommodation Visit Britain	Country Walking mag
2	5* silver	39%	?	Yes	Exmoor Accommodation Somerset Accommodation Visit Southwest	Exmoor Coast & Country
3	None	16% (beds)	95%	Yes,	Only Porlock TA	None
4	5* silver	49%	?	Yes Most important		
5	4*	65 – 70%	75%	Yes	Exmoor Accommodation Visit Exmoor	Somerset brochure L&L Scene Niche mags
6	4*		?	Yes, only recently optimised	Lynton TIC	L&L Scene
7	4*	55%	50%	Yes, high on search engines	Exmoor Accommodation	Exmoor Farm Holidays
8	None		?	Yes	Pay per click on Google, Late Rooms, Bookings.com	L&L Scene
9	3*	50%	30%	Own website	AA & Pets Welcome	Exmoor Visitor

**Table 9b – Business survey results 2 – Business marketing for self catering accommodation**

	<b>Graded</b>	<b>Annual Occupancy</b>	<b>Repeat bookings</b>	<b>Own Website</b>	<b>Most effective internet ads</b>	<b>Paper ads</b>
1	4*, 3*	54%	60% but not all every year	Yes, main source of business	Mainly web based	BHS Stillwells
2	4*	69%	48%	Own website works well.	<a href="http://www.cottageguide.co.uk">www.cottageguide.co.uk</a> brings in the most bookings What's on Exmoor	Dropped out of EC&C – 5 enqs last year
3	4*	72%	50%	Own site	Visit Britain, Best walks, Porlock.co.uk, Exmoor accommodation	EC&C works well Freedom, Great British Accommodation
4	None	80% May to Sept, then very quiet	Lots	Own site	2 x Letting agents Hoseasons & Country Holidays	NDMB guide
5	3* camping		In excess of 40%	Own website	Various Exmoor websites, Lynton site & UKcampsites, AA	NDMB, AA
6 (camping)	None	Around 36%	60%		Mainly word of mouth Various sites, including Porlock.co.uk UKcampsites.co.uk	Exmoor Visitor, Lonely Planet Guide, Rough guide
7	4*	60%	40% but not all every year	Own website	50% from booking agency. Own website and links	Trying ND & Exmoor brochure. The lady, Daltons weekly, walkers mags, the Legion
8	4*	77%	65% but not all every year	Own website	Own Website brings in 70% of business	Pets Welcome Exmoor Visitor

**Table 10 – Business survey results – Visitor profile**

	Visitor age	Where from	What do they do?
<b>Serviced</b>			
1	30 - 60		Walk
2		UK, Netherlands, France, Israel, Australia, Canada	Walk, Cycle, visit tea rooms
3	Mature	SE, London, Bath, Bristol	
4	Mainly older, inc in young professionals from London		Relax, eat out
5	All ages	All over Russia, Cuba, Libya	Walk, cycle, ride, mountain bike, shoot, hunt, fish
6	40 - 50	London, Birmingham, Wiltshire, Bristol, Holland Germany	Walk, relax
7	Over 40's but increasingly younger DINKS	Bristol, Essex, Birmingham, London, Dorset	Walk, eat out, visit National Trust properties
8			Walk
9	Older	All over. Midlands, London, overseas	Explore villages
<b>Self-catering</b>			
1	Families, couples	All over the world, mainly UK and Europe	Ride, short walks
2	All ages, lots of retired (60's), mostly couples	All over the UK, from Inverness to Cornwall	Walk with dogs, ride, explore villages, fish, sightseeing by car
3	Families, younger people (20's & 30's), middle aged – elderly walkers	London, Brighton, Worcs, Glos, Norfolk, Essex, Yorkshire, Hants, Cornwall. Holland, Germany, Hungary, Finland, Switzerland	Walk
4	40 – 80 age range Couples, rarely families	Birmingham downwards, most from London & Home Counties	Walk
5	Young couples, families	Bristol, Birmingham, Essex, South Coast, recently Wales	Walk, fish, ride
6 (camping)	18 – 50 Couples, some families School age groups	Bristol, the Midlands, London, Holland (less recently)	Walk, mountain bike, sightsee
7	Families with younger children and couples	London & SE, Midlands and E Anglia, Wales	Walk
8	A mixture, not many young children.	Mainly South East plus Wales, Surrey, the East	Walk, ride

## **Part C – Overview of the development and promotion of tourism in Exmoor National Park**

### **C1 Introduction and Exmoor National Park Management Plan targets**

- C1.1 The third part of the “State of Tourism in Exmoor National Park” outlines the involvement in tourism of various public and private sector organisations, Exmoor National Park Authority’s contribution to tourism partnerships, tourism activities and achievements. It also expands on the information gleaned from interviewing accommodation providers on their activities and place in the National Park.
- C1.2 The Exmoor National Park Management Plan 2007 – 2012 “Enhancing the qualities that make Exmoor Special” sets out the long-term vision and outcomes for Exmoor National Park and the more specific objectives and achievements to be accomplished during the period of the Plan. While the National Park Authority is the statutory authority required to prepare the National Park Management Plan, the Plan is a plan for Exmoor, not just for the Authority.
- C1.3 The achievement of the targets set out in the Plan relies on commitment from a wide range of organisations and individuals. The vision for recreation and tourism on Exmoor and the main objectives for tourism are set out below.

#### ***Vision / desired outcome for recreation and tourism on Exmoor***

- C1.4 The desired outcome for tourism set out in the Exmoor National Park Management Plan is:

***“By 2020 there is a warm welcome and high quality experience for everyone who visits Exmoor seeking inspiration, tranquillity and active outdoor recreation, provided by a sustainable tourism and recreation economy in harmony with local communities and the environment, and contributing to the achievement of a carbon-neutral National Park”***  
***Exmoor National Park Management Plan 2007 – 2012***

#### ***Tourism related targets from the Exmoor National Park Management Plan 2007-2012***

- C1.5 The Management Plan also sets out objectives and targets for tourism in the National Park. These are set out in table 11.

**Table 11 – Objectives and targets for tourism from the Exmoor National Park Management Plan 2007-2012**

**Objective G4 – To ensure that Exmoor provides a high quality experience for visitors from all backgrounds and of all abilities and that tourism is environmentally sustainable, deriving value from the special qualities of the National Park and not detracting from them**

Target G 4.1 - At least 95% of visitors will express satisfaction with their visit to Exmoor as measured in bi-annual visitor satisfaction survey and more general visitor surveys undertaken during the period of the plan. Lead organisation: Visit Exmoor\*

Target G 4.2 - At least 5% of tourism businesses based in the National Park will be participating in the “CareMoor” initiative and encouraging visitors to contribute voluntarily to funds for conservation projects by the end of 2009. Lead organisation: Exmoor National Park Authority

Target G 4.3 - At least 25% of tourism related businesses will be demonstrating a range of actions leading to environmentally sustainable operation by the end of 2012. Lead organisation: Exmoor National Park Authority

**Objective G5 – To maximise the economic and social benefits to the economy of Exmoor that recreation and tourism bring and to spread these benefits across as wide a range of people and businesses as possible**

Target G 5.1 - Overall visitor spend in Exmoor National Park will have increased by 25% in real terms by the end of 2012 compared to estimates for 2005. Lead organisation: Visit Exmoor\*

Target G 5.2 - At least 60% of all food-related businesses including hotels, restaurants and catering businesses will be utilising food using ingredients produced in the greater Exmoor area by the end of 2009 and will be identifying these on menus and publicity materials. Lead organisations: Somerset Food Links and Source

Target G 5.3 - Training and skills development in recreation management, adventure tourism and other relevant activities will be available locally benefiting at least 60 students per year over the period of the plan, e.g. Foundation degree in Adventure Tourism and Outdoor Professional Training Instructors Courses (OPTIC) programme. Lead organisations: West Somerset Community College (with Somerset College for Art & Technology and Plymouth University); Lead organisation: Active Exmoor

**Objective F1 To raise awareness of Exmoor and its special qualities and ways in which they can best be experienced and enjoyed**

Target F1.1 - Awareness of Exmoor in national polls will be increased to at least 12% by the end of 2010. Lead organisation: Visit Exmoor\*

\* Visit Exmoor ceased operation at the end of 2007 and so three National Park Management Plan targets (G 4.1, G 5.1 and F 1.1) do not currently have a lead organisation.

## **C2 Tourism development activities and achievements during 2006 and 2007**

C2.1 There is little doubt that tourism promotion and marketing of Exmoor National Park and surrounding areas has suffered from a general lack of resources and is less effective than it could be because of a lack of coordination or any single shared strategy.

### ***QUEST (Quality Underpins Exmoor's Sustainable Tourism)***

C2.2 An opportunity to achieve a more coordinated approach was provided in 2003 when Exmoor National Park Authority secured funding from the Countryside Agency for a five year national demonstration pilot project for sustainable rural tourism. The initiative was launched in 2003 and worked in collaboration with public sector organisations and private sector businesses to strengthen Exmoor as a high quality visitor destination under the project name - QUEST (Quality Underpins Exmoor's Sustainable Tourism)

C2.3 The QUEST initiative aimed to bring people together to deliver a consistently high quality visitor experience and maintain a vibrant and sustainable tourism industry which brought benefit to the environment and local communities. The project closely followed the principles of Integrated Quality Management. This was intended as a pilot project which could be rolled out to other parts of the country working to similar principles as those set out in the *QUEST Strategic Action Plan for Sustainable Tourism in the greater Exmoor area 2004 – 2009*: considering the interplay between the industry, visitor, environment and community in their sustainable tourism strategies.

C2.4 The QUEST Strategic Action Plan sets out an eight point action plan which covers:

- the establishment of effective partnership working
- enhancing the quality of the visitor experience
- improving the viability and competitiveness of tourism on Exmoor by improving the quality of the place, the product and services
- marketing tourism in the area in a co-ordinated and targeted way
- establishing stronger links between the environment and tourism
- increasing awareness about Exmoor and the resource it provides for business activity
- identifying and promoting the professional & business support & development needs of tourism businesses
- providing long term economic and community benefits for the residents of the greater Exmoor area and spreading the economic benefits of tourism amongst its local people and communities,

C2.5 Phase Two of the Project saw some changes and integration with the emerging Visit Exmoor partnership initiative. More funding bodies were involved: the Countryside Agency, Exmoor National Park Authority, the Coleridge Way Project and Visit Exmoor. The Somerset Tourism Skills Network employed the QUEST Project Manager two days a week as County Skills Co-ordinator, allowing some of the successful training to be rolled out across Somerset. The remaining time was spent on marketing for both Visit Exmoor and the Coleridge Way walking route, quality awareness and research, as well as steering Exmoor National Park through the process of signing up to the European Charter for Sustainable Tourism.



### ***Visit Exmoor***

- C2.6 During 2006 and 2007, the focus for tourism development and promotion was provided by Visit Exmoor, the partnership between Exmoor National Park Authority, West Somerset District Council and local tourism providers. The emphasis of the partnership was to enable National Park Authority and District Council resources to be combined with those of local tourism associations to a programme of activities led by the business sector. Despite significant achievements and a well developed promotion and marketing strategy for the Exmoor region, the Visit Exmoor partnership closed in November 2007. Appendix 2 provides an outline of some of the activities and achievements of Visit Exmoor while it was active. Significant achievements included:
- Public relations campaign
  - Effective Visit Exmoor brand development
  - Marketing and promotion initiatives and strategy development
  - Visit Exmoor website linked to regional and national tourism websites.

### ***The Coleridge Way***

- C2.7 The Coleridge Way has been extremely successful in attracting short break visitors to lesser known areas of the National Park along a walking route linking the Quantock Hills with Exmoor. It is 36 miles long, starting in Nether Stowey and ending in Porlock. It was launched in April 2005 and attracted a great deal of coverage in the national and local press and was featured in BBC television's "Countryfile" programme. Hundreds of people from all over the country have walked the route and the feedback from them has been very positive. Businesses along the route, which is designed to run through a village every 5 or 6 miles, have reported increases in visitors and a separately commissioned survey has estimated that Coleridge Way walkers are spending at least £80,000 a year within the local economy. The Coleridge Bridleway was added later taking a slightly different route, from Nether Stowey to Exford. Setting up the routes was a three year project with a dedicated project officer working with a steering group from five local authorities along the route. It has demonstrated that there is a real market for a short promoted walk that can be achieved over a long weekend.

### ***Training for tourism businesses***

- C2.8 Over the past five years a training programme for tourism businesses has been developed, which has aimed to encourage high standards among the tourism businesses in and around the National Park. The Exmoor National Park Authority has run the Exmoor Awareness programme for the past 5 years. These events aim to educate the tourism providers about the special qualities of the National Park in order for them to be better informed when telling their visitors about the area. In 2005 green awareness workshops were developed aimed at helping tourism businesses become more environmentally aware. The QUEST project organised a programme of training for tourism businesses over the last 3 years and these included workshops on customer care, marketing, quality awareness, the new Fire Safety and Food Hygiene regulations, using local produce, welcoming cyclists, welcoming the Ironman competitors and green awareness. Approximately 280 people have attended the workshops over three years, plus approximately 40 per Exmoor Awareness series each year.

### ***Exmoor Excellence Awards***

- C2.9 The Exmoor Excellence Awards were piloted by the QUEST Project in 2006. They were based on an action in the *Strategic Action Plan for Sustainable Tourism in the greater Exmoor Area*: to “Establish “Exmoor Excellence” as a charter for kite-marking and encouraging and promoting high quality and best practice ..... and encourage participation in regional and national quality and ‘best practice’ awards”.
- C2.10 The second year of the Exmoor Excellence Awards, promoted as a Visit Exmoor initiative, saw an increase in the number of businesses entering the award and a very high standard of entry. Three categories were judged: Bed and Breakfast, Attractions and Self-catering. Applicants were encouraged to demonstrate a commitment to providing good quality and excellent levels of customer care, demonstrate use of local produce and a commitment to caring for the environment and promoting Exmoor’s special qualities, to have invested in staff training and introduced marketing initiatives to promote their business.

### ***European Charter for Sustainable Tourism in Protected Areas***

- C2.11 In September 2007 Exmoor National Park Authority was granted the European Charter for Sustainable Tourism in Protected Areas. The Charter seeks to recognise parks which are following the right approach in developing and managing sustainable tourism. It is concerned with structures, objectives and actions, including their comprehensiveness and sustainability.
- C2.12 The Charter commits signatories to implementing a local strategy for ‘sustainable tourism’ defined as: ‘any form of development, management or tourist activity which ensures the long-term protection and preservation of natural, cultural and social resources and contributes in a positive and equitable manner to the economic development and well-being of individuals living, working or staying in protected areas.’
- C2.13 *The Strategic Action Plan for Sustainable Tourism in the greater Exmoor area 2004 – 2009* was an important component of the Charter application. In order for the Charter Award to be renewed this Strategy document will need to be revised and rewritten to take it forward for a further five years from April 2009 onwards.
- C2.14 The European Charter is becoming increasingly popular with National Parks and other Protected Areas across Europe, although Exmoor was only the second National Park to be awarded the charter in England. It allows National Park Authorities to demonstrate their own commitment to managing tourism sustainably and promotes the sharing of best practice between the participating Protected Areas.

### ***CareMoor and Paths Partnerships***

- C2.15 Exmoor National Park Authority is working with Exmoor businesses, residents and visitors to generate funds through an environmental support fund (ESF), CareMoor for Exmoor.
- C2.16 The principal aim of CareMoor for Exmoor is to encourage visitors, local communities and businesses to become aware of, and involved in, the conservation and enhancement of Exmoor’s environment. Money generated is used directly to help conserve and enhance Exmoor National Park under four

themes – **C**onservation, **A**rchaeology, **R**ights of way and **E**njoyment. All funds raised by the ESF are spent on these projects.

- C2.17 Funds are raised through donations, sponsorship, percentages of ticket or entry fees, proceeds from events and collection boxes. Over £15,000 has been raised over the past three years and funds have enabled a range of projects including funding Exmoor Conservation Volunteers to build fifty dormouse nesting boxes and providing specialist tools for archaeology volunteers.
- C2.18 Previously, the Exmoor Paths Partnership raised money using similar methods to those mentioned above. Over the three years of the project over £20,000 was raised for path improvements across Exmoor National Park and it is anticipated that CareMoor can have a greater impact than currently when some development capacity can be provided.

### ***Events & Festivals***

- C2.19 Working closely with community groups and local businesses, the three year Events Project achieved the launch of 6 new annual festivals: Exmoor Food Festival; Dunster Days Gone By; Porlock Arts Festival; South West Countryside Fair at Wimbleball Lake; the Watchet Festival and the Dulverton Folk Festival.
- C2.20 In 2005, five new events were staged and attracted an estimated 20,000 people. A formula supplied by EKOS Consultancy estimates that visitors spend £103 a head. There was an emphasis to spend project money within the Greater Exmoor area by using local printers; entertainers, food suppliers; craftspeople wherever possible, thus further supporting the local economy.

### ***Active Exmoor Sports Tourism Project***

- C2.21 Active Exmoor is a sports tourism project focusing on supporting Exmoor's outdoor activity industry. The Project is financially supported by: Somerset Rural Renaissance; Exmoor National Park Authority's Sustainable Development Fund; Sport England; West Somerset Council; Somerset County Council; Devon County Council and Dulverton Town Council. It began as a community sports project and widened its remit to include sports tourism in 2006.
- C2.22 The Active Exmoor project aims to support and develop Exmoor's outdoor activity industry. During its first year it delivered 89 qualifications to young adults under the OPTIC (Outdoor Professional Training Instructors Certificate) scheme, formed an Outdoor Activity Network, worked with Visit Exmoor to produce a new website, successfully bid for Sustainable Development Funding to secure the Somerset stage of the Tour of Britain cycle race for Exmoor and supported and promoted a number of other outdoor events, including the Ironman triathlon. It also co-ordinated the Exmoor presence at the Outdoor Show in Birmingham and distributed the Moor Active newsletter to over 60,000 people.
- C2.23 Plans for the second year of the Project include a pocket guide to outdoor activities on Exmoor, an outdoor activity club for the region and developing on-line booking for activities on the website as well as continuing to attend exhibitions and supporting and promoting outdoor events.

### ***Exmoor National Park Sustainable Development Fund***

C2.24 The Exmoor Sustainable Development Fund (SDF) is a dedicated fund of £200,000 per annum for the National Park area provided by Department of Environment, Food & Rural Affairs (Defra) and administered by Exmoor National Park Authority. In addition, the South West Regional Development Agency contributed an additional £100,000 for the three years from 2005 to 2007. Over 2006 and 2007 there were over 59 expressions of interest, 30 completed applications and 23 grants awarded totalling £434,300. A number of the grant have been for tourism-related projects including:

- A new bird hide for **South West Lakes** Trust at Wimbleball Lake which replaced the old bird hide after 20 years of service to visitors. A new 70 metre access track was also constructed, making it ideal for wheelchair and pushchair use.
- An SDF award to the Moorland Mousie Trust has meant that, after years of hard work by the local charity, the **Exmoor Pony Centre** finally opened its doors to visitors early in 2006. The Centre caters for people who want not only to learn more about the ponies, but also be able to interact with them. As founder Val Sherwin puts it: "What could be a more perfect way to see Exmoor's natural beauty than on the back of one of its native ponies?"
- '**Exmoor & Quantock Hills on Horseback**', a booklet containing 11 new horse-riding circular routes including pull-out laminated maps and essential riding information, aims to attract visitors, highlight the special qualities of the Exmoor and Quantock Hills area, promote sustainable tourism and bring socio-economic benefits to local businesses and communities.
- SDF part funded the **Festivals and Events Project**, which is outlined earlier, in B2.10. The Exmoor Food Festival, which has been supported by the Project over the past 3 years, has attracted over 16,000 people and a survey carried out by Somerset Foodlinks revealed that 40% of these visitors come from Greater Exmoor 24% from the rest of Somerset & Devon 24% and 36% from further afield. Nearly 1500 people attended the **WoodFair** in the castle grounds in Dunster.
- Exmoor & Quantock Local Food Ltd, trading as **Source**, has been established to provide the distribution link between local producers and potential trade and home customers. Operating as a co-operative, the office and warehouse are on Tower Farm in Lydeard St Lawrence, and the producers are based across the Exmoor and Quantock area.
- SDF provides ongoing support for the work of **Active Exmoor**, details in C2.21
- The **Exmoor Golden Horseshoe** endurance horse riding event was re-launched in 2007, with the costs underwritten by the SDF. It is the best-known and toughest endurance ride in Britain, and draws its competitors from all corners of the UK. Run over Exmoor since 1974, the format has changed from the original one-day 50 mile ride and it is now 100 miles over two days.
- Funding from the SDF helped secure 60 miles of the prestigious **Tour of Britain** cycle race over Exmoor in 2007. Exmoor was hailed as the undisputed highlight of the race, viewed by visitors, local communities and schools alike and the Tour will be returning to Exmoor in 2008.
- **Sustainable Tourism Business Development** is an SDF funded project providing practical and financial advice to those tourism businesses wishing to operate in a more resource efficient and sustainable manner. The project included funding for professional environmental audits to be conducted,

resulting in action plans. Small grants were also available for businesses to implement these actions, and to join the Green Tourism Business Scheme to demonstrate their environmental commitment.

- **Treborough Hill Cross Country Course** has been established at Treborough Common with SDF funding. The cross country riding course is open to all and has jumps suited for all abilities.

### ***Local authorities***

C2.25 **Exmoor National Park Authority** provides support to the tourism economy through a range of actions including:

- A lead role in conservation and enhancement of the special qualities of the National Park on which the tourism economy is wholly dependent, including high quality landscape, wildlife and cultural heritage
- A lead role in maintaining the recreational and tourism infrastructure including the public rights of way network; access to open country; public toilets outside settlements; car parks; national and local trail maintenance and promotion etc.
- Visitor information and guidance on places to visit and things to do including Exmoor National Park Authority website; National Park Centres; support to local information centres and local information points; publication of the Exmoor Visitor newspaper; various information publications and interpretation; advice to event organisers, and ranger services etc.

C2.26 **West Somerset Council**, in addition to having played a key role in supporting the achievements of the Visit Exmoor partnership, supports the tourism economy through a range of actions including:

- contributing to the Tourist Information Centres in Minehead, Watchet and Porlock
- Providing a new Tourist Information and Interpretation Centre on the sea-front in Minehead
- Supporting the West Somerset Strategic Partnership which in turn has supported tourism projects such as the Events and Festivals Project.

C2.27 **Somerset County Council** and **Devon County Council** are both working with their district council partners in developing Destination Management Organisations (DMOs) and have tourism marketing programmes which include Exmoor in their activities

C2.28 **Somerset County Council** has a number of services that are involved in tourism, including Rights of Way, Planning, Countryside, Culture and Arts and there is a small team of officers with specific responsibility for maintaining and developing Somerset's position as a popular visitor destination. This unit has developed the Visit Somerset website and destination management system and works with district tourism officers, as the Somerset Tourism Partnership, on a range of marketing activities.

C2.29 **Devon County Council** is also involved in a number of areas affecting tourism, including rights of way, public transport, countryside management, planning and the libraries and museums service. They also have a small team of officers dedicated to encouraging the sustainable development of tourism in the county.

C2.30 **North Devon District Council** supports tourism as a significant sector of the local economy and delivers this service through the North Devon Marketing

Bureau (now part of North Devon Plus). It markets the area through a website, brochure production and advertising campaigns, provides training for tourism businesses and supports seven tourist information centres across the district.

***Local tourism associations***

C2.31 A number of private sector tourism organisations within the National Park carry out tourism marketing activities. The main marketing activities for each over the past two years are listed below:

- Exmoor Tourism Association: website, exhibition attendance, Coast & Country brochure
- Exmoor to Sea: website, brochure
- Exmoor Farm and Country Holidays: website, leaflet.
- Visit Dunster; website, leaflet, events
- Porlock Tourist Association: Visitor Centre, website, leaflet, events
- Lyn Association of Commerce and Tourism: website and brochure
- Marketing Association promoting Lynton and Lynmouth on Exmoor: events, website.

More details of the work of all of the above can be found in the next section.

### **C3 Development and promotion of tourism on Exmoor**

#### ***Exmoor National Park Authority involvement with tourism partnerships***

- C3.1 In 1985 the tourism industry was recognised as being a fundamental partner in assisting the conservation and access aims of the National Park. Exmoor National Park Authority and the West Country Tourist Board encouraged the English Tourist Board to create a Tourism Development Action Programme (TDAP) for the Exmoor area. This resulted in a public/private sector partnership which was to address the future development of Exmoor as a visitor destination in an environmentally designated area. Involving local authorities and tourism businesses it was concerned with extending the season to make better use of resources and in consolidating and increasing the value of tourism expenditure and employment in ways which were complementary to the conservation of the environment. The TDAP laid the foundations for the subsequent close relationship between the tourism industry and the National Park Authority.
- C3.2 The Exmoor Area Tourism Advisory Group was set up in 1990, developed from the earlier grouping and providing a forum for encouraging dialogue and action in developing the common interests of the tourism industry and the National Park. This group, in turn, developed into the Visit Exmoor Forum. Its founding members included Exmoor National Park Authority, West Somerset District Council and representatives from a number of tourism associations and parishes in the area. The members of the Forum worked together to form a legally constituted partnership which would be responsible for tourism promotion and development.
- C3.3 Visit Exmoor became a company limited by guarantee in 2005. The Board consisted of nine directors: one from West Somerset Council, one from Exmoor National Park Authority and seven (later increased to nine) elected from the membership of 470 local tourism businesses. West Somerset Council provided funding for the partnership and one member of staff and Exmoor National Park Authority provided office space and up to 2.5 full time equivalent staff. Although Visit Exmoor achieved considerable success in some areas (which are outlined in appendix 2), in the second year of operation a range of factors became apparent which meant that the longer term success of Visit Exmoor was not likely to be achieved with the existing organisational arrangements. The directors of the company sought to work together and overcome a range of problems and this may well have been possible in a climate of goodwill. However, the situation was made difficult by a sustained and highly vocal public criticism of the activities of Visit Exmoor by a small number of local critics.
- C3.4 The cessation of the Visit Exmoor initiative at the end of 2007 has led to a reduction in joint working and leaves a number of visitor-related objectives and targets in the Exmoor National Park Management Plan which were allocated to Visit Exmoor and now have no lead agency to take them forward.

#### ***Regional partnerships***

- C3.5 The structure of tourism regionally is in a process of change, with the South West Regional Development Agency (SWRDA) having a more active involvement in tourism. The role of the regional tourist board, South West Tourism, is likely to become more strategic (concentrating on leadership, lobbying and intelligence). Destination Management Organisations (county based partnerships between local authorities and tourism businesses) have been developed and will work on marketing, place shaping, business support,

etc. South West Regional Development Agency investment in tourism will be re-aligned to support the new structure with funding channelled through South West Tourism and the destination management organisations.

- C3.6 Exmoor is one of the strongest “brands” in the region, reinforced by the areas status as a National Park. Maintaining an involvement with the emerging destination management organisations for Somerset and Devon and with South West Tourism should help to ensure that the area is promoted sympathetically.

### ***The role of public sector bodies – National and regional context***

- C3.7 A number of public sector bodies are involved with the marketing and development of tourism which affects the Exmoor area, from VisitBritain and Enjoy England at a national level, South West Tourism and the South West Regional Development Agency at regional level and two county councils and two district councils at a local level. In addition to this there are various private sector associations and businesses promoting the area to varying degrees.
- C3.8 **VisitBritain**, the national tourism agency, promotes Britain internationally in 36 markets and promotes England in Britain, France, Germany, the Netherlands and Ireland. Its mission is to build the value of tourism to Britain.
- C3.9 **Enjoy England** is the official tourist board for England and part of VisitBritain. Its mission is to grow the value of tourism throughout the English regions throughout the year.
- C3.10 Strategic responsibility for tourism in England lies with the Regional Development Agencies (RDAs). Delivery of their tourism strategies – marketing, PR etc – is contracted in most cases to their respective Regional Tourist Boards. Total direct RDA funding of the management and development of tourism in 2006 / 07 was estimated to be £28.8million, (excluding London).
- C3.11 Tourism is not a statutory service for local authorities and consequently there has been no common approach to tourism management among the 400+ authorities in England. However, the Tourism Management Institute, the professional body for people involved in destination management across the UK, encourages a common approach through its training and advice on destination management.
- C3.12 **South West Tourism** is the Regional Tourist Board for the South West of England, a partnership of private enterprise and both local and central government. It currently works to encourage the promotion and development of tourism across the South West (Bath, Bristol, Cornwall and the Isles of Scilly, Devon, Dorset, Somerset, Gloucestershire and Wiltshire). For the past 30 years, it has been the only region wide organisation working for, and representing the interests of tourism businesses across South West England. With over 5,000 members, it provides tourism businesses with the latest relevant information on current and future issues, for those who earn their living from tourism and who need to be up to date with its development.
- C3.13 **The South West of England Regional Development Agency** has the strategic lead for tourism in the South West. ‘Towards 2015 – Shaping Tomorrow’s Tourism’ is the regional tourism strategy, led by the South West of England Regional Development Agency working with South West Tourism as the regional delivery partner. The strategy focuses on three main aims:
- Delivering Sustainable Tourism: In order that tourism can continue to be a key sector of the South West England economy for decades to come, it is essential that we deliver truly sustainable tourism.



- **Driving Up Quality:** South West England is not, and does not want to become, a 'cheap' destination. Driving up quality and the competitiveness of businesses in the region, will increase value and respond to the changing demands of our existing and new visitors.
- **Effective Destination Management:** It has been decided that for the strategy to be truly effective, it is essential to rationalise the wide variety of methods and structures involved in supporting and promoting tourism destinations, thus enabling professional destination management and targeted marketing. This has led to the creation of Destination Management Organisations (DMO) and Destination Management Partnerships (DMP).

The strategy has been developed in response to a changing tourism industry and pattern of demand. The key changes are summarised in table 12.

C3.14 A Destination Management Organisation involves pooling together both public and private sector expertise, resources and knowledge. The DMO will become the strategic arm for the destination's delivery plan – enhancing economies of scale, strong research data and increased quality delivery. DMOs are intended to merge and streamline many of the activities currently undertaken by individual organisations. Exmoor National Park sits between two of these new organisations: the Somerset and Devon Destination Management Organisations and this presents a concern that the Exmoor brand may not be effectively promoted because of a split across the two county-based organisations.

**Table 12 – Changing trends in tourism (South West Regional Development Agency)**

- |   |
|---|
| <ul style="list-style-type: none"> <li>• Increase in overseas competition – trends to 2011 shows most UK tourism expenditure will go abroad</li> <li>• Ageing population – changing visitor profile</li> <li>• Short breaks showing more market increase than long holidays (4+ nights)</li> <li>• Lifestyle changes – visitors seek experiences not just trips away</li> <li>• Customers are more demanding – i.e. quality, choice, value for money</li> <li>• Need to improve public realm infrastructure – i.e. traffic congestion/public transport and public amenities</li> <li>• A stronger voice for tourism</li> <li>• Increase in the use of I.T.</li> <li>• Need to concentrate on markets most likely to offer real market growth at a visitor recognised level – i.e. Somerset, not Taunton Deane</li> <li>• Duplication of workload by private and public sectors</li> <li>• Local authority boundaries have little meaning to visitors</li> <li>• Public sector tourism budgets as a 'non-statutory' activity are generally shrinking.</li> </ul> |
|---|

### ***Somerset DMO***

C3.15 The Somerset Tourism Partnership was set up in June 2006 to progress the formalising of 'Destination Management' arrangements in Somerset following the production and adoption of 'Tourism in Somerset: A five year delivery plan 2006 – 2010' in April 2006. The Partnership is one of public and private sector representatives. The public sector partners are Mendip District Council, North

Somerset Council, Sedgemoor District Council, Somerset County Council, South Somerset District Council, Taunton Deane Borough Council and West Somerset Council.

C3.16 Six priority areas were identified in June 2006 from the delivery plan as key areas that STP should focus its efforts on. From this list six working groups have been established which will lead on: Promotions (Marketing and publications); Sustainability; Information (Information provision and Tourism Information Centres); Research; Communications (National/regional PR, Tourism Conference and engagement with private sector); Training and Quality.

### ***Devon DMO***

C3.17 Destination Devon is led by the private sector, working in partnership with a number of public agencies to help shape the future of Devon's tourism industry. Devon's vision for success is "a thriving, profitable year-round tourism industry, which brings benefits to our communities, cares for our world-class environment and competes on the world stage as a quality visitor destination".

C3.18 Devon is well recognised by UK visitors but there has, to date, been no countywide partnership for the destination. The inaugural meeting of the Devon DMO (DDMO) in the autumn of 2005 was an historic occasion –the first time tourism officers, councillors and the private sector from around the county sat around a table together.

C3.19 This partnership is committed to enhancing both Devon's image and management of tourism. A company limited by guarantee will be established to co-ordinate the delivery of tourism in Devon. A destination audit was completed indicating visitor numbers steadily declining from 7.1m in 2001 to 5.6m in 2004. This led to an agreement that action was required. The DDMO will work hard alongside tourism businesses to counter this trend.

C3.20 The DDMO is developing a UK marketing campaign including national advertising, PR, online promotions and a marketing campaign in German. It is promoting and operating the county's official tourism website [www.discoverdevon.com](http://www.discoverdevon.com) (500,000 visitors in 2007) and its experience websites: [www.active Devon.com](http://www.active Devon.com) – [www.foodiedevon.com](http://www.foodiedevon.com) – [www.naturallydevon.com](http://www.naturallydevon.com) – [www.culturaldevon.com](http://www.culturaldevon.com) and [www.familydevon.com](http://www.familydevon.com) It offers training and advice for tourism businesses and industry newsletters and aims to play a key role in lobbying and influencing regional policies and strategies.

### ***Local area tourism partnerships***

C3.21 The Devon and Somerset models differ in that Somerset is forming one county-wide body whereas Area Tourism Partnerships are at the core of Destination Devon. These organisations already existed in parts of Devon (for example, North Devon Marketing Bureau). The DDMO believes that tourism businesses value a local contact and feel part of their community and destination brand. Tourism businesses wishing to benefit from services offered by Destination Devon and from SW Tourism are required to join their Area Tourism Partnership. These organisations represent a public / private sector partnership and are undertaking the following roles to ensure that businesses are kept informed, engaged and are represented: Membership and Industry Engagement; Destination Marketing; Visitor Services; Events and Festivals.

The Devon Area Tourism Partnership covering Exmoor is North Devon Plus (formerly North Devon Marketing Bureau).

### ***North Devon Plus***

- C3.22 North Devon Plus was created in 2007, bringing together the north Devon Marketing Bureau, North Devon Enterprise Agency and North Devon and Exmoor Regeneration Company. Key areas of focus for North Devon Plus include:
- The promotion of the Green Business Scheme accreditation
  - Assisting tourism related businesses to make the most of the natural assets of the area including the UNESCO Biosphere status
  - Co-promotion through UNESCO with other world biospheres.
  - The support of regeneration of key historic towns, for example Bideford, and traditional coastal resorts specifically Ilfracombe and Westward Ho!
  - The needs and issues of our rural hinterland including the development of the Ruby Country Initiative and promotion as part of a world class area.
  - North Devon's participation and support of the emerging Devon Destination Management Organisation (DDMO).
  - Collaboration to ensure the full potential of Exmoor National Park as a tourism destination is fulfilled.
  - Aiming to ensure that every aspect of the visitors' stay in North Devon is a quality experience; from accommodation to visiting a family attraction; from eating out to using local amenities.
  - Develop emerging growth tourism markets such as activity based extreme water and land based sports and events.

### ***Tourism Associations on Exmoor***

- C3.23 There are a number of private sector tourism organisations within the National Park, each have their own promotional website and leaflets or brochures, some also organise events.
- C3.24 The **Exmoor Tourist Association** (ETA) was set up in 1982 to help maximise the benefits of sustainable tourism for its members and to bring members' businesses, and Exmoor, to the attention of people considering visiting Exmoor for holidays and short breaks. Membership is open to any business on Exmoor and in surrounding areas. The ETA has a website, a helpline for members and a members' newsletter, and took over publication of the Exmoor Coast & Country tourism brochure in 2008.
- C3.25 The **Exmoor to Sea** Association of Visitor Attractions has 23 Members situated in and around the Exmoor National Park in West Somerset and North Devon, all selected by the Association for their quality and value for money. Exmoor to Sea has a website and produces and distributes a brochure.
- C3.26 **Exmoor Farm and Country Holidays**: The Exmoor Holiday Group is a co-operative of 35 members offering high quality accommodation in farm and country houses, self catering cottages and award-winning campsites based in the Exmoor National Park. The group, was formed in 1975, and has its own website and leaflet.
- C3.27 **Visit Dunster** is made up of businesses in Dunster and has its own website, leaflet and programme of events

C3.28 **Porlock Tourist Association** runs the Visitor Centre, has a website, leaflet and organises events.

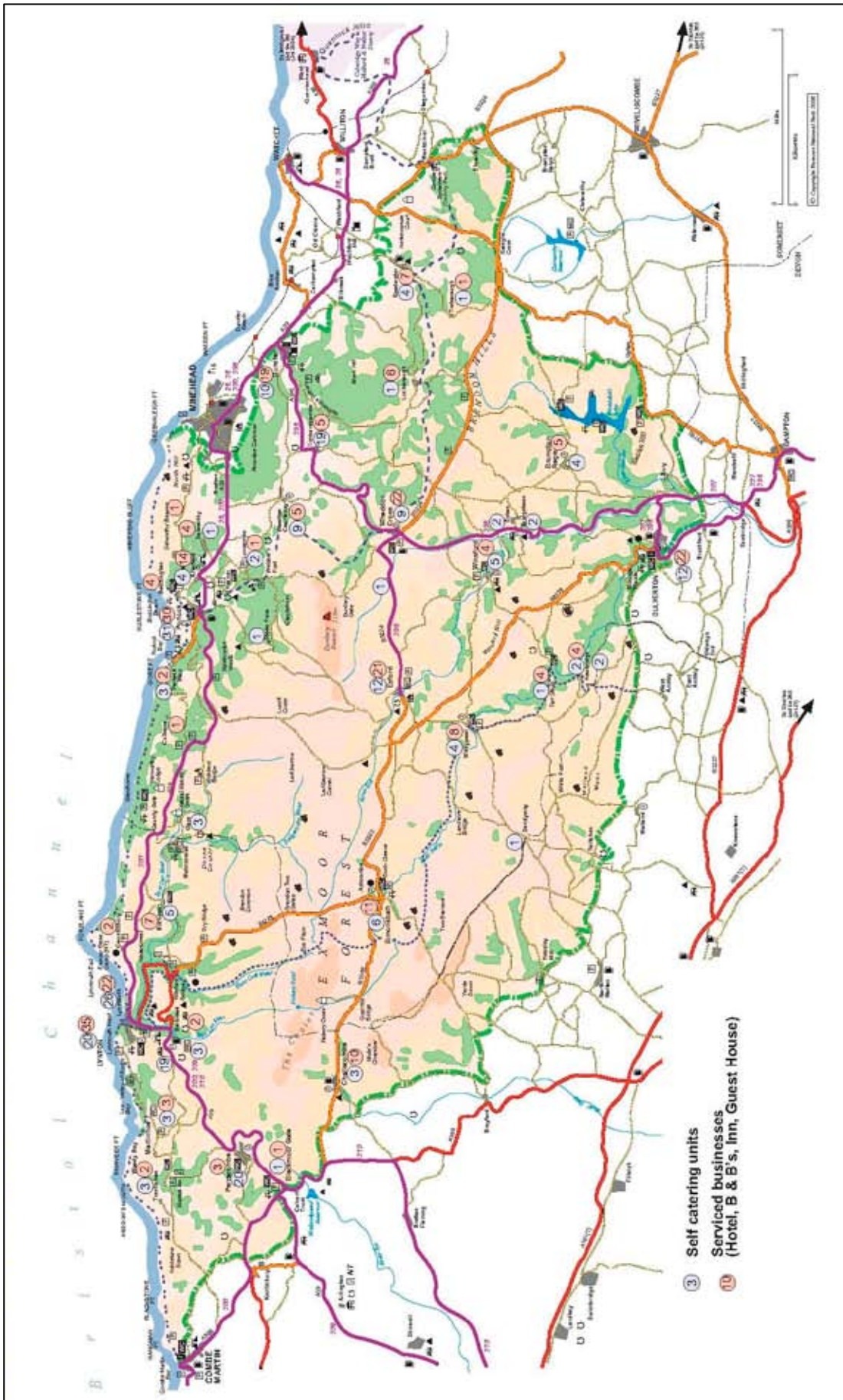
C3.29 **Lyn Association of Commerce and Tourism (LACT)** produces the “Lynton & Lynmouth Scene” website and brochure.

C3.30 **Marketing Association promoting Lynton and Lynmouth in Exmoor (Maple)** was formed on May 16<sup>th</sup> 2006 to promote Lynton & Lynmouth in Exmoor. The objectives of the M.A.P.L.E. Group are:

- To encourage business and the community to work together;
- To increase public awareness and to heighten the profile of Lynton & Lynmouth and the surrounding area;
- To promote tourism throughout the year.

Maple has a Website and arranges an annual food festival.

Figure A1 – Distribution of tourism accommodation in Exmoor National Park





## Visit Exmoor activities and achievements 2006 to 2007

### **Public Relations Campaign**

PR Matters was appointed as public relations consultant for Visit Exmoor in October 2006. The brief was to raise awareness of the greater Exmoor area in the national press and media. Significant coverage was achieved through specific media contacts provided by PR Matters and a series of press releases and organised visits for journalists and travel writers contacts made by the Visit Exmoor team. The monetary value of the achieved national media coverage based on the equivalent paid for advertising amounted to in excess of £343,000. Articles were secured in most of the national newspapers (including the Mail on Sunday, Sunday Mirror, the People, the Times, the Sunday Telegraph, the Observer, the Daily Express and the Guardian) as well as the travel press (table 13). Additional coverage was achieved in the regional papers, so the value of the coverage is an underestimate.

In addition, local tourism providers hosted press visits for journalists and travel writers from the Sun, BBC Countryfile magazine, the Daily Express, Take-a-Break magazine, the People, the Birmingham Mercury and the Gloucester Echo. Journalists experienced a number of activities (a deer walk, wildlife safari, riding) and visited attractions and villages across the Visit Exmoor area. See table 13 for full details.

### **Branding**

An eye catching and distinctive branding is regarded as a vital component of any strategy to meet the challenge of attracting attention to an area or product. Following a tender process where three companies submitted initial designs for the re-branding of Visit Exmoor, Qube were contracted to carry out the work and produced the new logo and strapline and branding guidelines for use on promotional materials (figure A1).

**Figure A2 – Visit Exmoor brand designed by Qube consultants**



### **Marketing & Promotion**

A marketing plan for the greater Exmoor area was developed and progressed by Visit Exmoor during 2007 incorporating a mix of PR, taxi advertising and press advertising together with a state of the art website. Adverts were placed in national newspapers following the launch of the website in late July. These were placed in the Observer, The People and The Telegraph.

**Figure A3 – Example of Visit Exmoor national press advertisement**



The advertising had a measurable effect and resulted in a significant increase in the number of visitors to the new web site [www.visit-exmoor.co.uk](http://www.visit-exmoor.co.uk) which consistently appeared on the first page of Google searches. The press advertising was followed by placing similar adverts in the Lady, Daily Express magazine, Yours magazine, Saga magazine, WI Life magazine and Choice magazine during August and September.

A less traditional form of marketing was also undertaken with nine black cabs in Bristol painted in a Visit Exmoor livery. The taxi campaign began on 9<sup>th</sup> August 2007 and ran for three months – National Park Centre staff reported an increase in enquiries from Bristol at their end of season meeting in September 2007 and accommodation providers have reported bookings as a result of this promotion.

**Figure A4 – Visit Exmoor liveried taxi in Bristol – Autumn 2007 PR Campaign**



Visit Exmoor banners were produced for the Tour of Britain cycle race in September and located at strategic points on the route. In March 2006, Visit Exmoor and the Exmoor Tourist Association took a stand at British Travel Trade Fair. The 2006 Group Travel Guide was up-dated and reprinted for the exhibition. A marketing campaign to promote walking holidays outside the peak season was successfully launched. Postcard mailers were distributed, a walks leaflet produced and a walking section added to the new website.

### **Visit Exmoor website**

Development of the Visit Exmoor website developed in 2006/07 took advantage of the South West Regional Development Agency (SWRDA) preferred option for destination management systems and websites which links to the main regional and national tourism sites and includes data sharing to reduce duplication of effort in collecting information. This approach enables a tourism business to enter details once and link their information to local, regional and national websites such as Visit Exmoor, Visit Devon, Visit Somerset and Visit Britain.

By linking the Visit Exmoor website with that for Active Exmoor, the Sports Tourism Project, potential visitors can easily access information on accommodation, attractions and activities. The website was launched in July 2007 and has been maintained by the West Somerset District Council since the closure of Visit Exmoor. Ideally, the website and destination management system will continue to be maintained, possibly by being incorporated in the new Minehead Visitor Information & interpretation Centre that opened in June 2008.

**Table 13 – Visit Exmoor generated press coverage from November 2006 to October 2007**

<b>Publication</b>	<b>Date</b>	<b>Subject</b>	<b>Circ'n</b>	<b>Value £</b>
<b>2006</b>				
Mail on Sunday	Nov 12	Coleridge Way feature	2,253,450	39,312
Sunday Mirror	Nov 12	Dunster by Candlelight/Dulverton by Starlight	1,380,560	576
The People	Nov 12	Dunster by Candlelight/Dulverton by Starlight	730,721	223
SWT Website	Nov 14	Dunster by Candlelight/Dulverton by Starlight	Website	
Sunday Mirror	Nov 19	Dunster Fair	1,380,560	256
The Times	Dec 09	Andrews on the Weir, Porlock	639,547	781
<b>2007</b>				
Bike Magic	Jan 15	Exmoor extravaganza	Website	
The Sunday Telegraph	Jan 28	Bark House	642,466	400
The Good Holiday Guide	Jan	Highcliffe House	900,000	1150
Bath Chronicle	Jan 20	West is the Way to Go, feature	12,330	1017
The Independent	Feb 3	Cottage + horse holidays	252,714	484
The Guardian	Feb 17	Andrews of the Weir, Porlock	366,233	456
Daily Telegraph	Feb 24	Exmoor - Best of Britain	896,197	200
Caravan magazine	Feb	Dulverton, Exmoor House	13,655	1014
Britain Calling	Mar	Coleridge Way guide/website	900	
Out & About	Mar	Quantock Food Festival	20,195	179
Outdoor Pursuits	Mar/Apr	Walking & Cycling Festival	15,000	317
Bath Chronicle	Mar 03	West Somerset Railway	12,330	1,017
The Observer	Mar 04	SW Coast Path	455,707	195
The People	Mar 25	Exmoor feature	730,721	13,550



<b>Publication</b>	<b>Date</b>	<b>Subject</b>	<b>Circ'n</b>	<b>Value £</b>
AngloFILE	Apr	Hunting Earl of Rone	1,000	
Bath Chronicle	Apr 21	Walking & Cycling Festival	12,330	1220
Western Daily Press	Apr 07	Walking & Cycling Festival	43,512	37
Sunday Mirror	Apr 15	Walking & Cycling Festival	1,380,560	128
Coach Touring	Apr	Quantock Food Festival	4,000	280
Group Travel Organiser	Apr	Dunster Castle	9,997	70
Daily Mirror	April 7	Channel View caravan park	1,542,414	336
Coast	Apr/May	Dunster Castle	31,496	60
Best of British	Apr	Quantock Food Festival	27,500	213
Best of British	Apr	Walking & Cycling Festival	27,500	500
Practical Motorhome	Apr	Walking & Cycling Festival	16,864	395
Motorcaravan Motorhome	Apr	Walking & Cycling Festival	37,256	219
Daily Mirror	Apr 21	Quantock Food Festival	1,542,414	1792
Daily Express Saturday mag	Apr 28	Minehead Hobby Horse	758,753	1875
London Cyclist	Apr/May	Walking & Cycling Festival	10,000	102
Choice	May	Walking & Cycling Festival	85,000	495
Motor Caravan	May	Hunting Earl of Rone	12,000	103
Int Travel Writers Alliance	May	Railways round Exmoor	6,600	
Practical Motorhome	May	Coleridge Way guide/website	16,864	395
My Weekly	May 05	Walking & Cycling Festival	195,809	1,196
Country Walking	Summer	Walking & Cycling Festival	46,849	161
Candis	May	Walking & Cycling Festival	301,309	200
Group Leisure	May	Railways round Exmoor	10,826	833
Western Daily Press	May 05	Exmoor Golden Horseshoe 1	43,512	224
Western Daily Press	May 05	Exmoor Golden Horseshoe 2	43,512	94
Heritage	01-May	Walking & Cycling Festival	51,212	156
The Sun	May 05	Gimmie Moor! Feature	3,031,724	16,000
Camping	01-May	Burrowhayes Farm campsite	201,827	320
Conde Nast Traveller	Jun	Five page feature + cover credit	84,783	40,500
The Sunday Times	May 13	Cloud Farm, Exmoor	1,236,911	798
Sunday Mirror	May 13	Railways round Exmoor	1,380,560	1024
Holiday Cottages	May/Jun	Quantock Food Festival	20,000	67
Holiday Cottages	May/Jun	Coleridge Way guide/website	20,000	67
Outdoor Pursuits	May/Jun	Coleridge Way guide/website	15,000	575
In Britain	Jun/Jul	Coleridge Way guide/website	30,585	229
Choice Days Out & Attrac'ns	Spring	Somerset round-up	60,000	20
Best of British	Jun	Selw'y & Return to M'head b'k	27,500	1,200
Daily Telegraph	May	Castle of Comfort - Paddy Burt	896,197	14,750
Out & About, Coach&Bus Wk	May	Railways round Exmoor	3,901	160
Guardian Top 50 Walks	Jun 02	Webbers Post to Stoke Pero	366,233	3,000
AngloFILE	Jun	Railways round Exmoor	1,000	
Coach Tours UK	Jun	Railways round Exmoor	6,400	1,800
In Britain	Aug/Sep	Railways round Exmoor	30,585	311
The Great Outdoors	Jul	Walk on Exmoor	11,368	1,828
Daily Telegraph Weekend	Jun	Exmoor Perambulation	898,817	20,000
Coach Tourism Professional	22-Jun	West Somerset Railway	5,300	325
Out & About	01-Jun	Exmoor Food Festival	3,901	166
Daily Telegraph, Travel	22-Jun	Bakelite Museum	898,817	23,000
Practical Motorhome	01-Aug	Dulverton Walk	16,864	899
Practical Motorhome	01-Aug	Railways round Exmoor	16,864	449
The Guardian	30-Jun	Devon feature	371,754	5,700
Win & Go	Aug+Sep	Feature + Yarn Market comp'n	500,000	18,000
Travel GBI	01-Jul	West Somerset Railway	11,324	384
Coach Touring	01-Jun	Railways round Exmoor	4,000	700
Coach Touring	01-Jun	West Somerset Railway	4,000	500
Enjoy South West-SWT mag	Summer	Holnicote Estate	Unknown	

Publication	Date	Subject	Circ'n	Value £
Daily Telegraph	14-Jul	Andrews on the Weir, Porlock	898,617	820
Daily Telegraph 'Weekend'	14-Jul	Andrews on the Weir, Porlock	898,616	7,666
Guardian Guide to Seaside	14-Jul	Minehead and Bluff Point	371,754	150
Destination UK	01-Jul	Exmoor Food Festival	12,640	425
BBC Homes & Antiques	01-Jul	Bakelite Museum	100,212	65
Guardian National Parks Su't	28-Jul	Exmoor	363,562	11,400
The Sunday Times	28-Jul	Exmoor - national parks feature	1,173,956	15,172
TravMedia - e-newsletter	03-Aug	Tour of Britain on Exmoor	Unknown	
TravMedia - e-newsletter	09-Aug	New Visit Exmoor Website	Unknown	
Leicester Mercury	04-Aug	Tour of Britain on Exmoor	73,634	350
Sunday Teleg. C'side supp't	19-Aug	Coleridge Way	636,681	280
Sunday Teleg. C'side supp't	19-Aug	Exmoor National Park	636,681	80
Somerset Life	01-Sep	Tour of Britain on Exmoor	14,692	207
TravMedia - e-newsletter	28-Aug	Tour of Britain on Exmoor	Unknown	
Times - SW England supp't	01-Sep	Tarka Trail, Exmoor	635,653	6,798
Coach Touring	01-Aug	Railways round Exmoor	4,000	700
Coach Touring	01-Aug	Exmoor Food Festival	4,000	350
The Independent on Sunday	09-Sep	Tour of Britain on Exmoor	216,371	189
The News Bureau website	10-Sep	Ex. Food Festival & Tug of War	Unknown	
Candis	01-Sep	Exmoor Food Festival	302,377	120
AngloFILE	01-Sep	Coleridge Way	1,000	
AngloFILE	01-Sep	Tour of Britain on Exmoor	1,000	
Sunday Mirror	17-Sep	Minehead Tug of War	1,427,617	256
Somerset Life	01-Oct	Exmoor Food Festival	14,692	518
Independent on Sunday	23-Sep	Lynton & Barnstaple Railway	211,627	84
Daily Telegraph - property	22-Sep	Exmoor	887,664	9,833
Daily Express	22-Sep	Exmoor	827,491	15,843
Daily Telegraph	22-Sep	Exmoor rutting stags	898,817	7,666
The Spark	Aug-Nov	Exmoor Food Festival	33,000	75
Glos Echo	22-Sep	Exmoor Food Festival	22,152	2,304
Best of British	01-Oct	Exmoor Food Festival	27,500	200
The Independent on Sunday	30-Sep	Exmoor Food Festival	216,371	189
The Sunday Mirror	30-Sep	Exmoor Food Festival	1,427,617	6,433
BBC Countryfile mag	01-Oct	Exmoor walks and rides	Unknown	1,875
The Observer 'Escape'	07-Oct	Ashwick House	455,707	110
Motorcaravan Motorhome	01-Oct	Ex. Food Fest./Two Moors Fest	37,256	100
Practical Motorhome	01-Nov	Exmoor Food Festival	16,864	449
Group Travel Today	Sep/Oct	Exmoor Food Festival	8,000	120
TravMedia - e-newsletter	14-Oct	The Old House, Nether Stowey	4,500	
Daily Telegraph	20-Oct	Boving	887,664	15,333
Coast magazine	01-Nov	Exmoor and Highcliffe House	30,880	9,999
The People	21-Oct	The Old House, Nether Stowey	722,148	267
In Britain	Dec/Jan	Somerset's Xanadu	27,293	280
Police Life	01-Oct	Exmoor Food Festival	42,000	800
Ambulance Life	01-Oct	Exmoor Food Festival	10,000	375
Enjoy South West SWT mag	Autumn	New Visit Exmoor Website	Unknown	
Enjoy South West SWT mag	Autumn	Exmoor Food Festival	Unknown	
The Week	20-Oct	The Old House, Nether Stowey	Unknown	
<b>Total</b>				<b>£342,864</b>

## Survey of accommodation providers - questionnaire

The following questions were used as the basis for structured interviews with Exmoor based tourism businesses during January – March 2008

### **Section 1. How's business?**

- 1a Capacity, (open all year? Real capacity, taking off closed periods,)?
- 1b Occupancy levels annually and specifically. When do you need more business?
- 1c Performance – is business improving or decreasing or staying the same?
- 1d Percentage of repeat visitors?
- 1e Forward bookings versus last minute?
- 1g How much more business do you want (what is their actual spare capacity)?

### **Section 2 What marketing are you doing?**

- 2a What marketing do you do, what works for you, target markets and who stays?  
(Who is visiting and why?)
- 2b Impact of new events, activities on their occupancy levels. Have you noticed a difference? Did events/activities boost bookings previously?

### **Section 3 Awareness of climate change**

- 3a Have you already acted to reduce your and your visitors CO2 emissions.  
If so, what have you done? Energy (inc travel), Purchasing, Waste
- 3b Use of local food supplies and any issues, successes, problems

### **Section 4 Exmoor**

- 4a How important is it to your business that you are in a National Park?
- 4b Do you promote Exmoor's special qualities or use Exmoor National Park in your marketing? And to guests when they are here?
- 4c What is your view of, relationship with, Exmoor National Park Authority?
- 4d What assistance/support do you feel you need from external sources?
- 4e What do visitors want/request?
- 4f What should be done for tourism interests within the National Park?
- 4g How should ENPA be working with tourism businesses, what should their role be?
- 4h What organisations are you a member of? Reasons and benefits?

