

# Exmoor National Park

Visitor Survey 2021



**EXMOOR**  
NATIONAL PARK





## Introduction

We are pleased to publish the results of the 2021 Exmoor visitor survey, undertaken by the Exmoor National Park Authority.

Given the immense challenge that society at large has faced as a result of the pandemic the record high satisfaction levels reported are a testament to the dedication, hard work and love of Exmoor that so many communities, partners and businesses have shown.

It is our hope that the data contained within this survey will be of use to a range of stakeholders as we collectively seek to manage sustainable tourism within the National Park for the benefit of all, in harmony with its special environment.

Our thanks to those that helped facilitate this survey and all those that gave their time to share their views and experiences.

Dan James  
Rural Enterprise Manager  
January 2022

# Methodology

Between July and December 2021 the National Park Authority conducted a visitor survey to gain a greater understanding of visitor views and ascertain their thoughts on a range of tourism related issues.

The research builds on previous surveys undertaken on a regular basis since 2005 providing qualitative views on the experience and behaviour of those visiting the National Park. It was the first face-to-face survey conducted since the start of the Covid-19 pandemic and the results indicate some areas where this has potentially led to a change in visitor behaviour.

Each survey was conducted face-to-face, taking approximately 10 minutes. Interviewees were selected at random. Interviews were only completed with those respondents that did not live in, or work within, Exmoor National Park.

The surveys were conducted at a range of locations within the National Park with larger samples taken at key towns and honey pots and smaller samples collected at more remote sites. This allowed us to reach visitors at both the main 'honey pot' locations but also in less visited areas of the National Park. By conducting the research over a 6 month period we were able to gather views both within and outside of the peak visitor season.

## Statistical Confidence

454 surveys were completed face-to-face with visitors. This sample size provides a confidence level of 95% with a margin of error (confidence interval) of 5%. In other words we can be 95% confident that the trends depicted in the survey are an accurate reflection of overall views within less than 5% either way.

Please note the results presented refer to actual responses – if a particular question wasn't answered then this is not included. As a consequence where results have been split amongst categories (e.g. staying / day visitors or first time / repeat visitors) the breakdown may not always correlate with the total and the smaller sample sizes will lower the confidence levels.

Location	Sample proportion
Combe Martin	2%
Doone Valley (Malmsmead / Brendon)	4%
Dulverton	5%
Dunkery Bridge / Dunkery Beacon	7%
Dunster / Nutcombe Bottom	9%
Exford / Landacre	3%
Haddon Hill	3%
Heddon Valley	3%
Lynton / Lynmouth	9%
Porlock	3%
Porlock Common	4%
Porlock Weir	6%
Simonsbath / Brendon Common	2%
Tarr Steps	11%
Valley of Rocks	9%
Watersmeet	5%
Webbers Post	7%
Wimbleball	6%
Winsford / Withypool / Wheddon Cross	2%
<b>Total</b>	<b>100%</b>

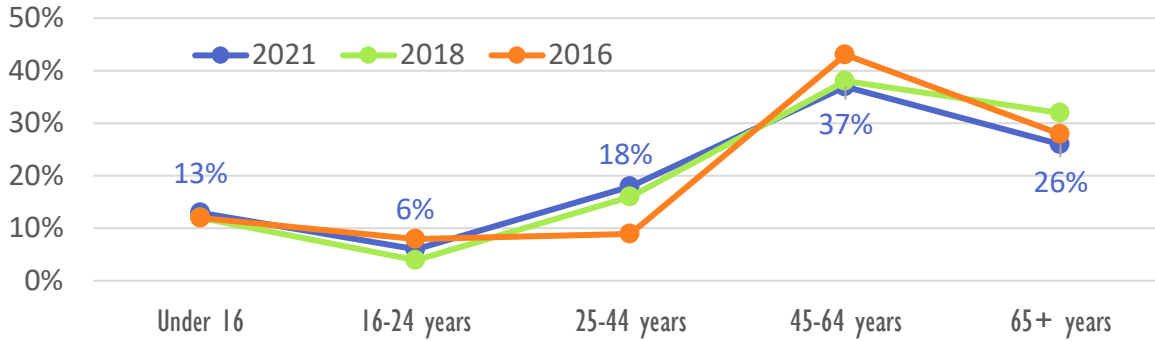
## Reference

If quoting from this survey please reference Exmoor National Park Visitor Survey 2021.

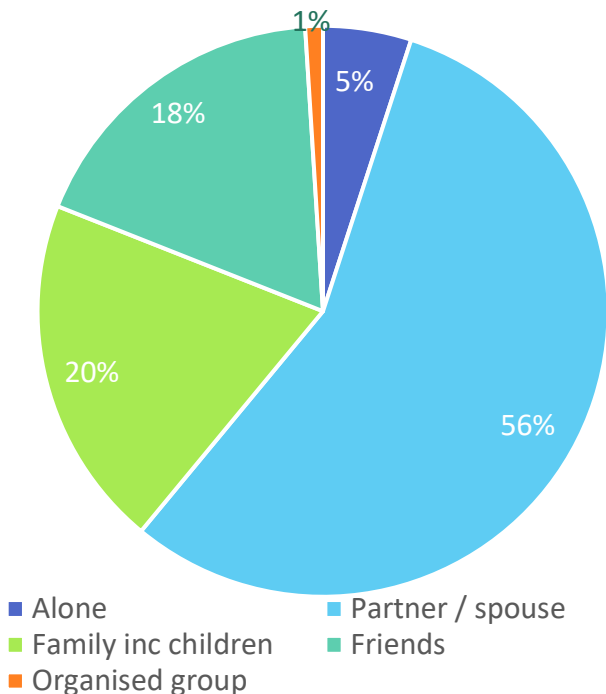
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# Demographics

## Age profile of visitors

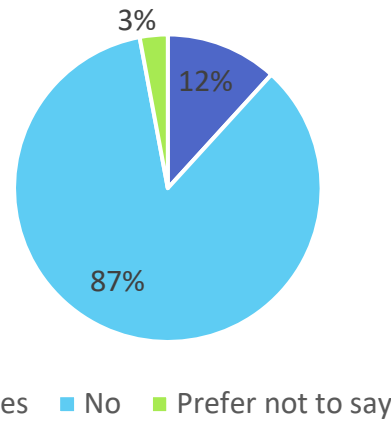


## Party type



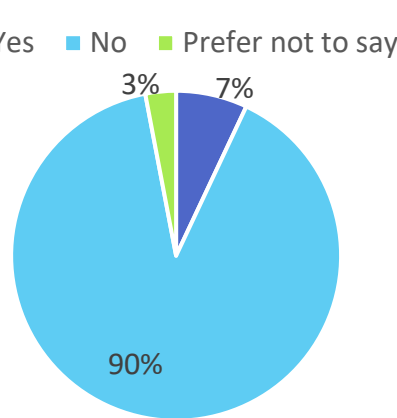
## Disability

*Do you have any longstanding health issues or disabilities that limit your daily activity?*



## Ethnicity

*Do you consider yourself to be a member of an ethnic minority?*



The **age profile** of visitors continues to be skewed towards older visitors, though there has been a slight upward trend in younger audiences (those aged over 45 represent 63% (72% in 2016)).

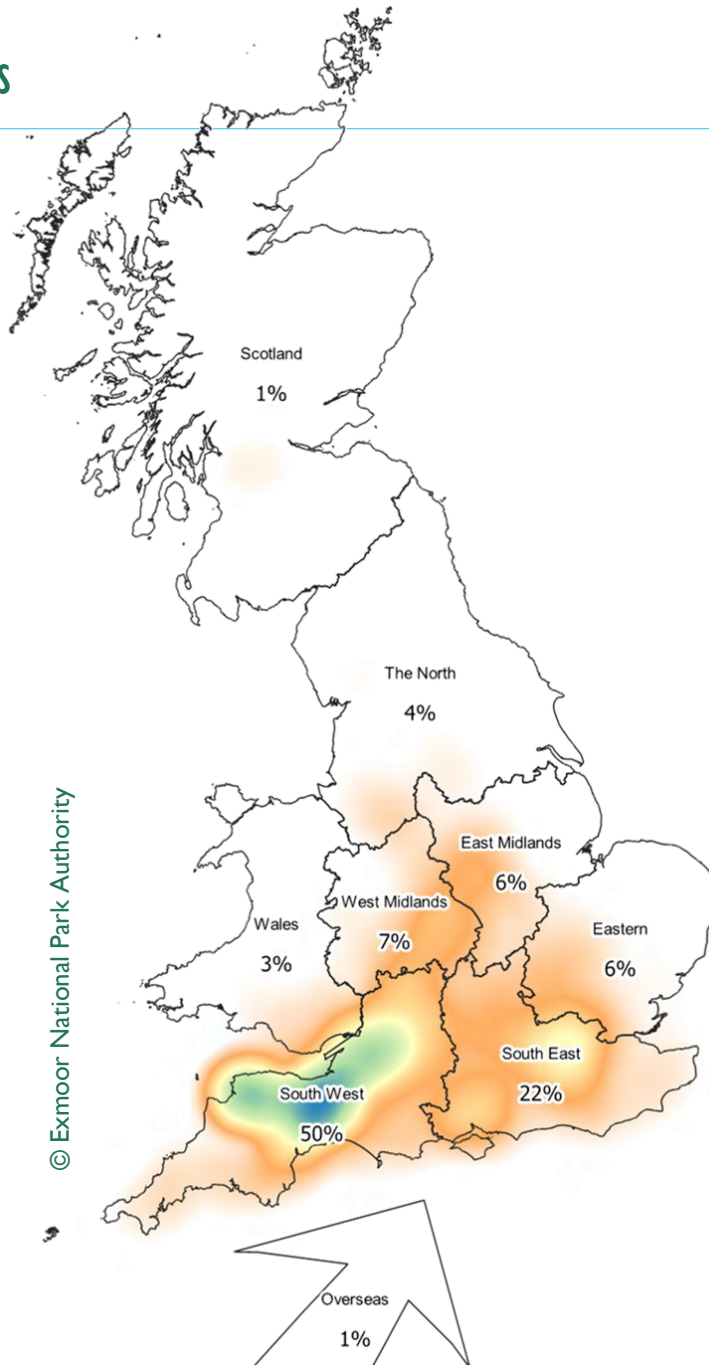
There has been an encouraging increase over the same time period of those aged 25-44 from 9% (2016) to 18% (2021), though this is only 2% higher than seen in 2018.

Over half of all visitors to the area are coming as a **couple**. 20% (15% in 2018) came as a family unit and 18% with **friends / wider family**. Just 1% came as part of an organised group - whilst this figure has never been high (3% 2018) the reduction is likely to be a direct result of the Covid-19 pandemic.

12% of visitors reported **longstanding health issues or disabilities** that limit their daily activity, compared to 18% reporting a disability / long term illness across England in the 2011 census.

There has been a significant increase in visitors that consider themselves to be a member of an **ethnic minority at 7% compared to 3% in 2018** (compared to 10% nationally according to the Campaign for National Parks MOSAIC project).

# Origin of visitors

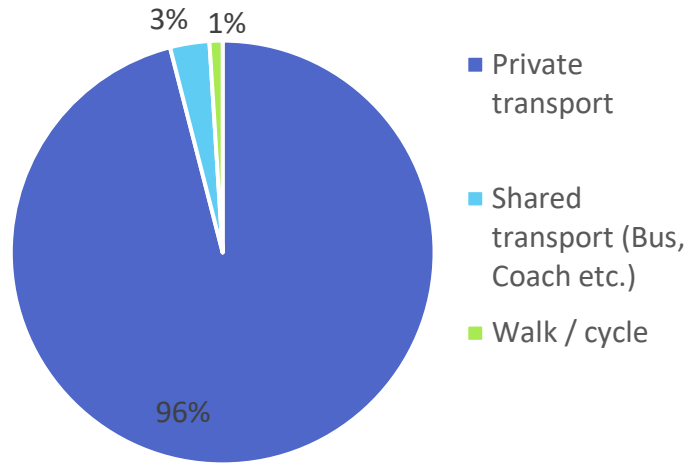


Half of all visitors came from within the **South West** region (including the majority of day visits from home). This year saw a slight increase in visitors coming from the South East of England (up to 25% from 17% in 2018). The core origin of visitors remains focused on the key M4, M5 and A303 corridors into the South West.

There has been a dramatic reduction in **inbound visitors**, accounting for just 1% of respondents, having been 12% and 9% in 2016 and 2018 respectively. This is the lowest figure since records in this format began in 2005 and will almost certainly be directly attributable to the travel restrictions resulting from Covid-19.

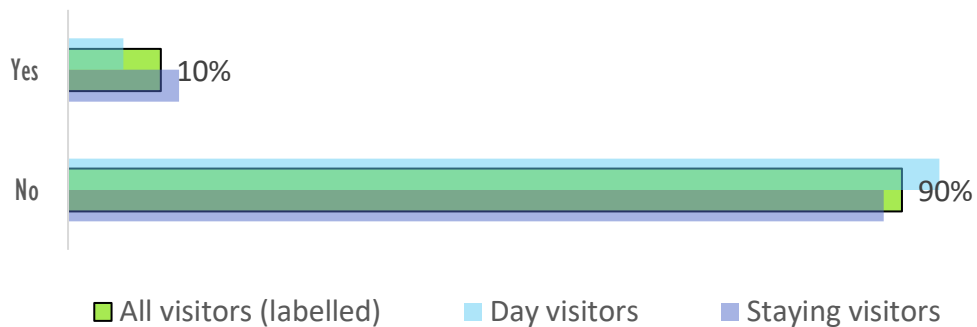
# Travel choices

## Travel mode to the area



96% travelled to the area by car, with only 3% travelling via public transport or shared transport (e.g. coach trip) reflecting the drop in those visiting as part of an organised group and also likely to be influenced by the Covid-19 pandemic.

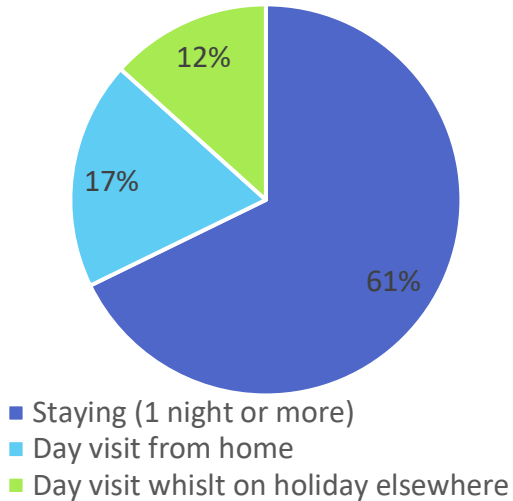
## Have you used, or are you planning to use, public transport during your visit?



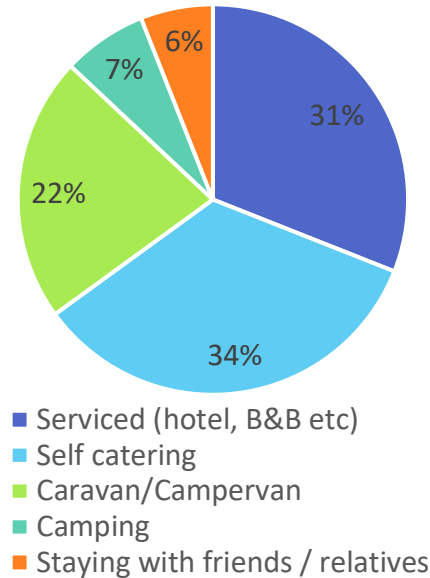
Despite the reintroduction of a coastal bus route between Minehead and Lynmouth (traditionally the most used bus route in the National Park) those that reported either using or planning to use public transport dropped slightly from 13% in 2018 to 10%. As seen previously, staying visitors were the most likely to use public transport.

# Day and staying visitors

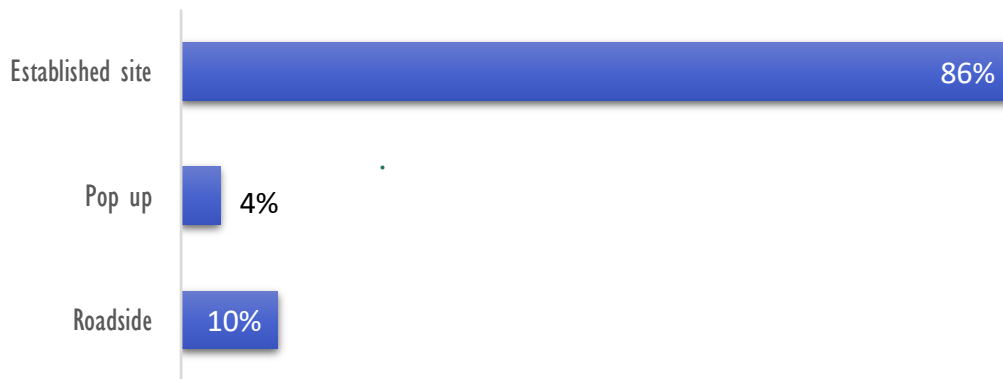
## Day vs staying visitors



## Type of accommodation



## Type of site used for camping / caravanning



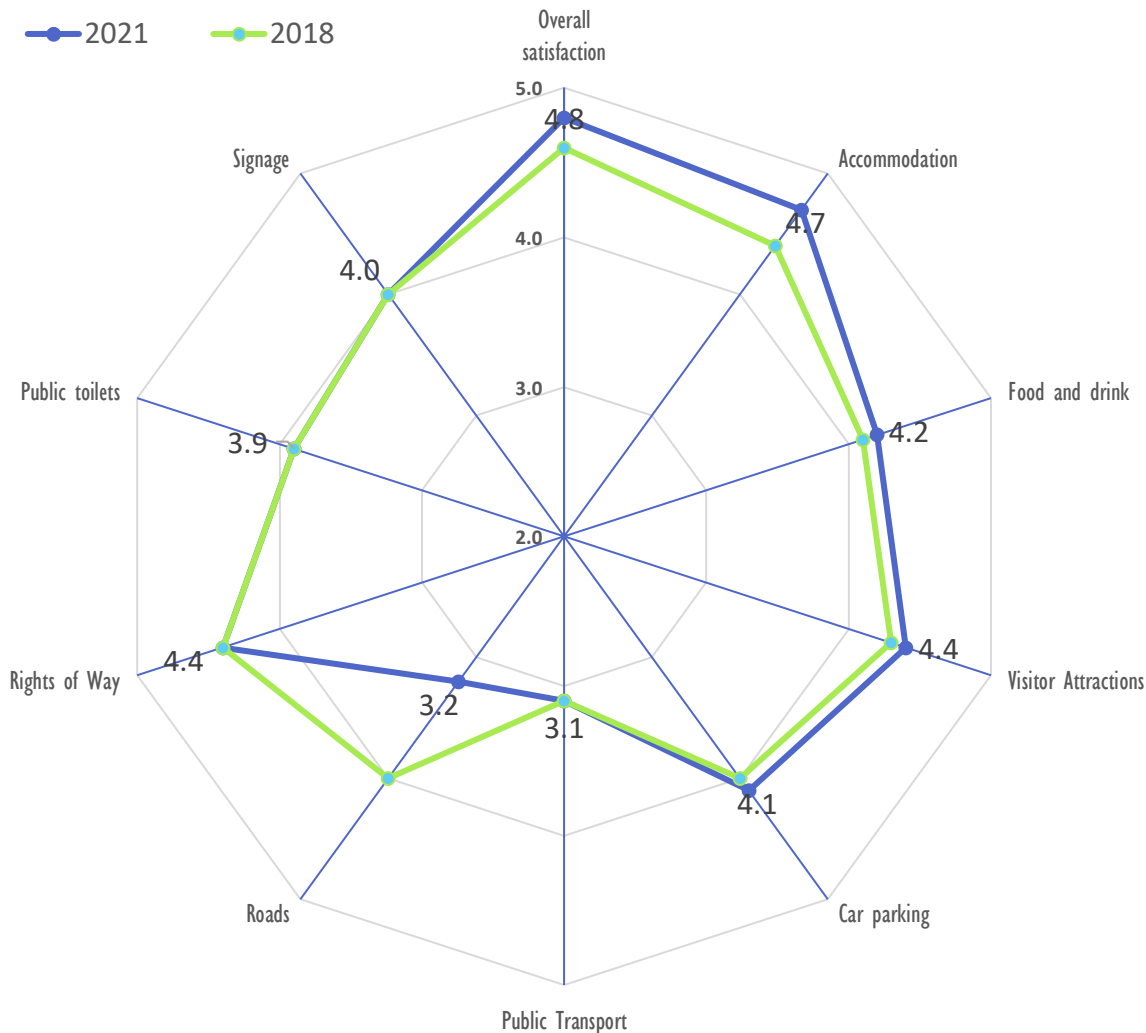
61% of those surveyed were **staying overnight** in Exmoor for at least one night. This is relatively high compared to other similar destinations – e.g. 46% North York Moors National Park (Visitor Survey 2021) and just 26% in Dartmoor (Visitor Survey 2017). It is also high compared to previous Exmoor surveys (51% were staying visitors in the 2018 survey).

This may be attributable to the Covid-19 pandemic with reports that most accommodation was fully booked for the main summer season and well into the autumn. Data was gathered from July when all restrictions on overnight stays had been lifted. Those on a day visit whilst on holiday elsewhere in the region, remained stable, but there was a drop in those visiting for the day from home.

As seen in previous surveys, when excluding those staying with friends and relatives (6%) there is a relatively even spread of **accommodation types** used by those staying overnight in the area – 31% using serviced accommodation, 34% using self catering and 29% combined for camping / caravanning.

Given perceived concerns around an increase in ‘fly camping’ this year’s survey also asked those camping / caravanning what type they were using. Whilst the majority were using either established or temporary pop up sites, 10% admitted to using roadside locations

# Satisfaction



**Overall satisfaction** continues to remain high. Those stating their overall experience of holidaying on Exmoor as 'Good' or 'Very good' remains at 99%. Within this it is worth noting the proportion rating their experience as 'very good' has risen to 81% from 67% in 2018.

Each aspect was rated from 1 – 5 where 1 = very poor, 2 = poor, 3 = average, 4 = good, 5 = very good to provide a mean average satisfaction score out of a maximum of 5.

In terms of satisfaction of individual aspects of the visitor experience there has been little or no change in views on many aspects, with no aspects being rated on average as below 'fair' and most aspects on average being rated as 'good' or better.

**Public transport** remains the least positive experience with a quarter citing their satisfaction as 'poor' or 'very poor' with reasons for this given focusing primarily on the lack of available routes and limited frequency of services.

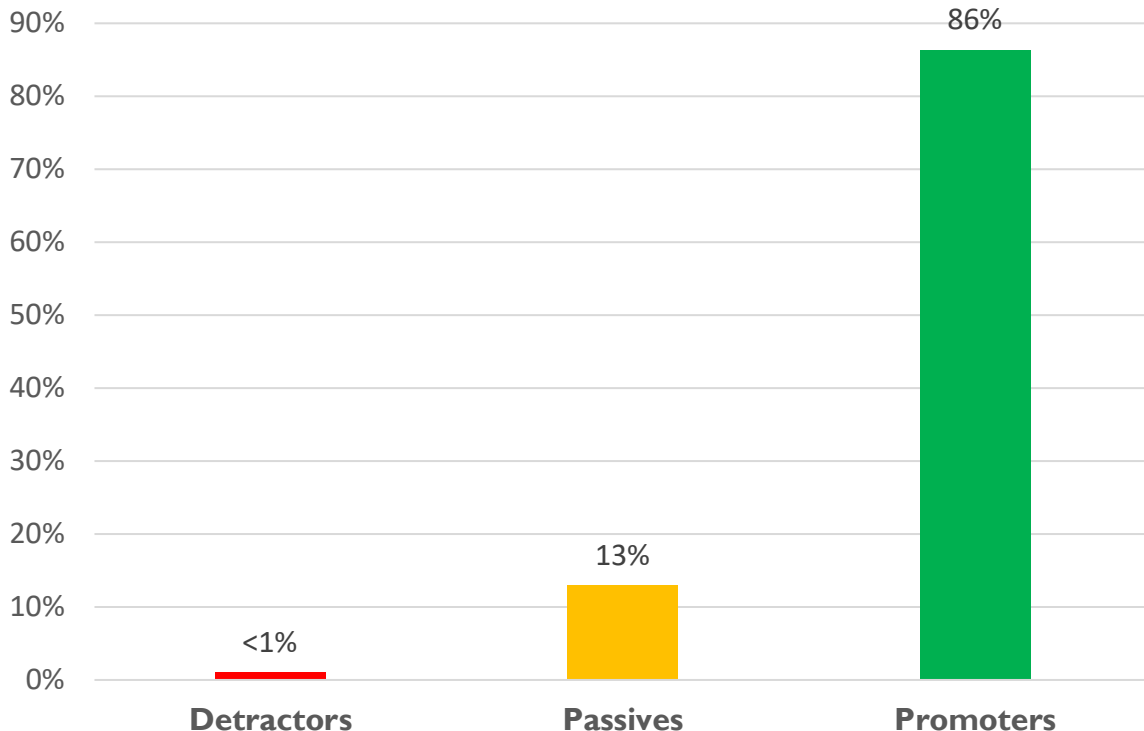
**Roads** also score lower as an average score, though less than 6% rate them as poor or very poor, Whilst some comments reflect concerns around the condition of the roads, others reflect more on their rural nature, being winding and narrow.



# Net Promoter Score

How likely are you to recommend visiting Exmoor to friends and family?

Detractors							Passives		Promoters	
0 <small>(Very unlikely)</small>	1	2	3	4	5	6	7	8	9	10 <small>(Very likely)</small>
0%	0%	0%	0%	0%	0%	0.2%	2.6%	10.8%	14.5%	71.8%



<div style="background-color: green; color: white; padding: 5px; width: 100px; margin: 0 auto;"> <b>Total promoters</b> (86.1%)         </div>	-	<div style="background-color: red; color: white; padding: 5px; width: 100px; margin: 0 auto;"> <b>Total detractors</b> (0.2%)         </div>	=	<div style="background-color: blue; color: white; padding: 5px; width: 100px; margin: 0 auto;"> <b>Net Promoter Score</b> <b>+86</b> </div>
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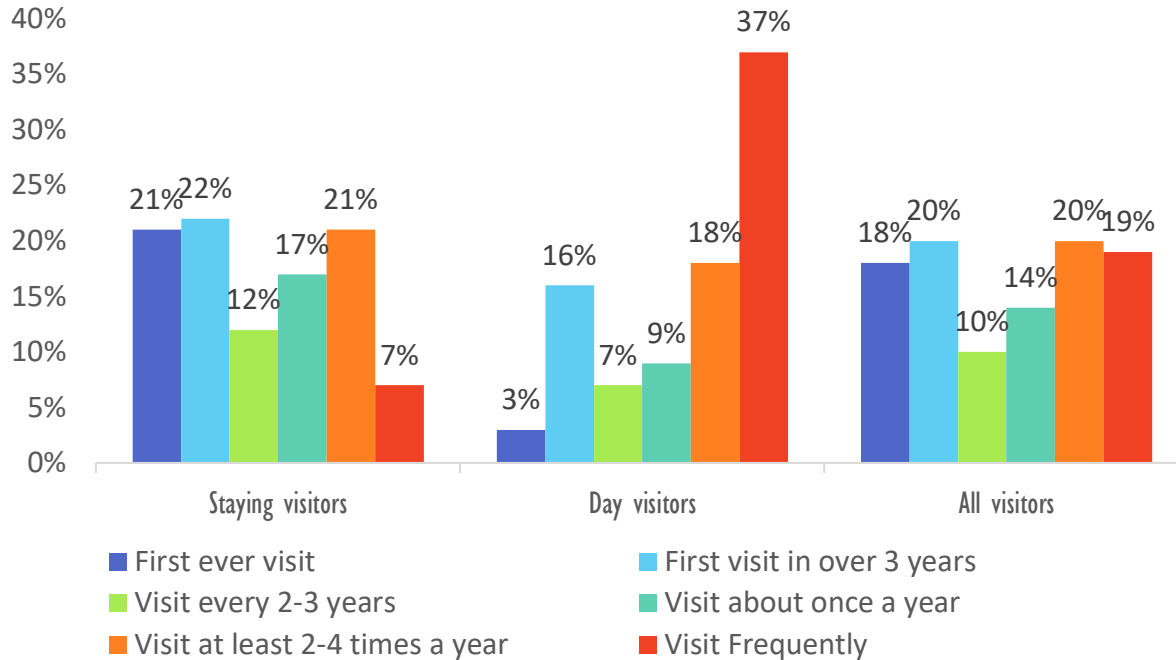
Over 86% of respondents are likely to **recommend** visiting Exmoor to friends and family (giving scores of 9 or 10).

Net Promoter Scores are used to understand customer loyalty and allow brands to benchmark themselves against each other. The total percentage of detractors (those scoring 6 or below) are taken away from the total percentage of attractors (those scoring 9 or 10). **Exmoor's Net Promoter Score is +86**, an increase from 77 in 2018. Scores can range from -100 to +100. Anything over 50 is considered good, and scores over 70% considered world-class.

It is worth considering that a third of visitors obtained information prior to their visit from friends and relatives underlining the importance and value of personal recommendations not only in retaining visitors but also attracting new audiences (see page 10).

# Repeat visitation

## Have you been to Exmoor before?



## Are you planning to Visit Exmoor again?



Exmoor continues to attract a high level of **repeat visitors**.

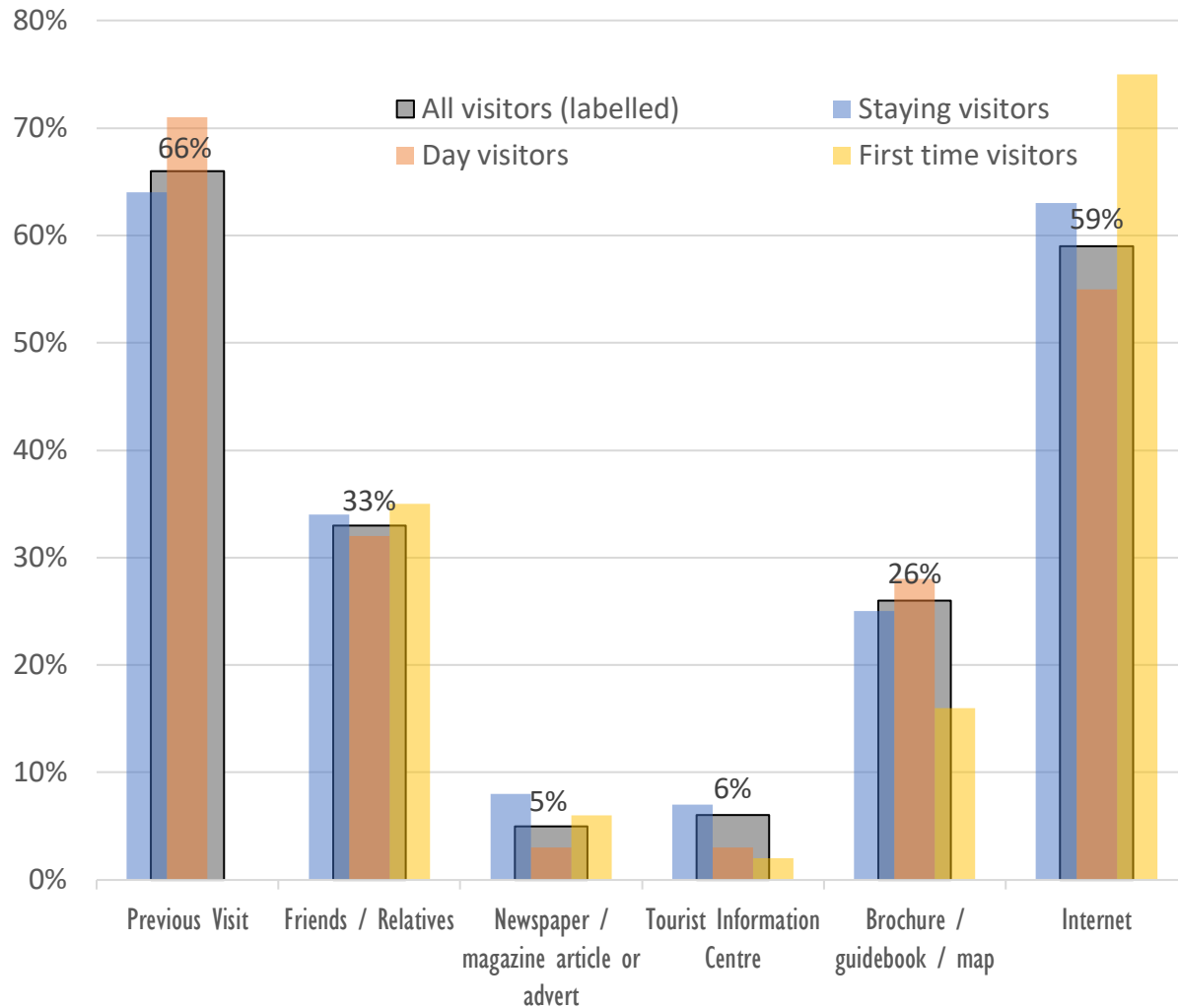
2021 did see a slight increase in both **first time visitors and those visiting for the first time in over 3 years** (39% of all visitors vs 35% in 2018).

18% of visitors were on a **first ever visit** to the area, whilst 19% stated that they visit frequently (i.e. several times a year). Whilst the majority of these very frequent visitors are day visitors, over 44% of staying visitors state they visit at least annually.

At the time of being surveyed no visitors had definite intentions to not visit again (1% in 2018) and just 3% were undecided, with 97% stating they expected to visit again (up from 86% in 2018).

A continued opportunity for growth is in attracting occasional visitors to visit more often (whilst the majority of visitors plan to visit again over a fifth of staying visitors were on their first visit in over 3 years). This highlights the opportunity for key tourism stakeholders, including local businesses, to maintain contact with previous guests with news, updates and offers.

# Information sources PRIOR to a visit



Visitors use a range of information sources prior to a visit.

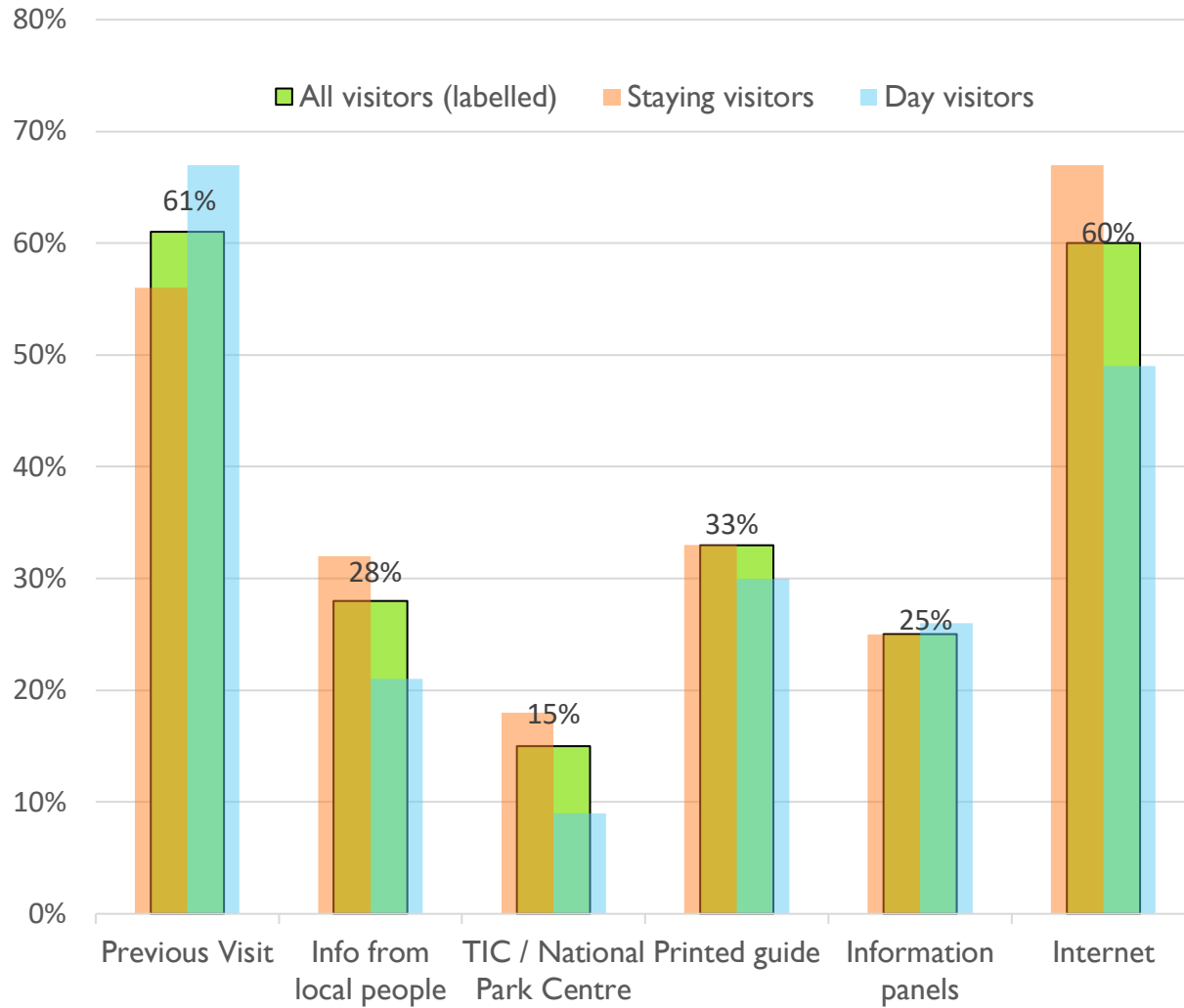
Two thirds of visitors rely on a previous visit, whilst a third acquire information via friends and relatives confirming the importance of **word of mouth** and personal experiences.

The use of the **internet** for information has risen significantly from 41% in 2018 for all visitors to 59% this year. This is a bigger jump than seen previously and may be a result of both increased internet usage but also the need to access up to date information as a result of changes arising from the impacts of Covid-19.

More **traditional methods** of gaining information through the press and media and use of Tourist Information Centres are significantly less influential these days, due to information online, it is recognised that the role of TICs is evolving with a stronger focus on inspiring and informing visitors during a visit rather than for example helping with booking accommodation and pre trip advice.

In relation to press articles it should be noted that research indicates that there are several mediators in every day life such as TV and press representations that subconsciously influence holiday choices (see 'From Qualities of Place to Qualities of Experience' Tim Wilkinson, Exeter University).

# Information sources DURING a visit



**Internet use and knowledge from a previous visit** dominate as the primary sources of information for visitors once in the area.

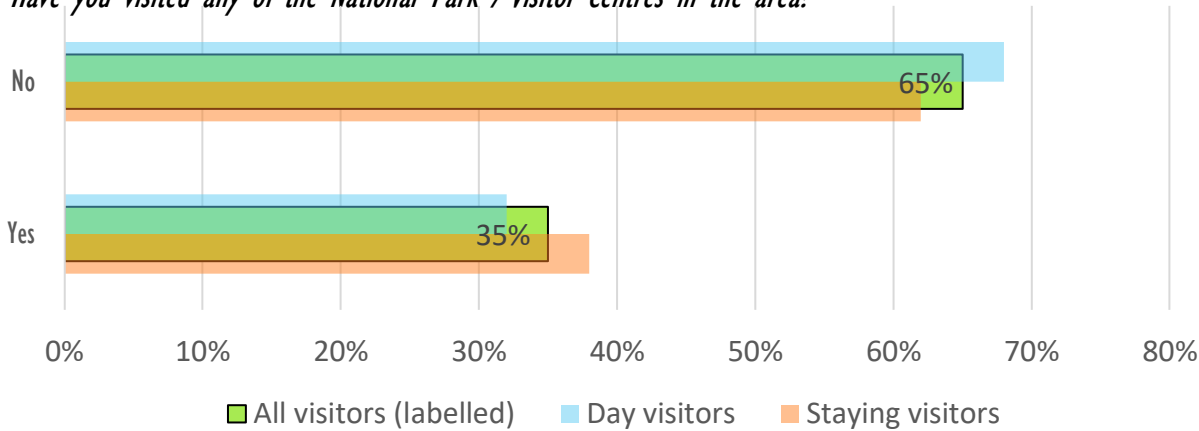
Use of the internet has doubled from 30% in 2018 to 60% - with the majority accessing the internet via smartphones / tablets.

This increase will have impacted on the numbers using more **traditional forms of information** and may be attributable to a combination of improved connectivity across the Exmoor area, in addition to the need to access up to date information given the impacts of Covid-19 and staffing shortages.

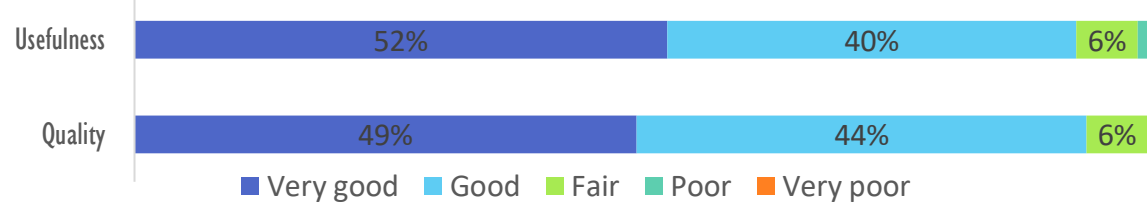
# Information and Interpretation

## Use of National Park Centres and Visitor Centres

*Have you visited any of the National Park / Visitor Centres in the area?*

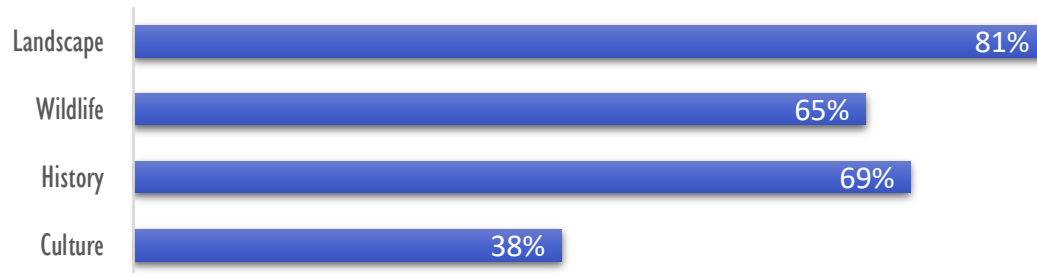


## Perceptions of Exmoor National Park Authority publications



## Understanding of the 'Special Qualities' of Exmoor

*Has your understanding of any of the following issues increased during your visit?*

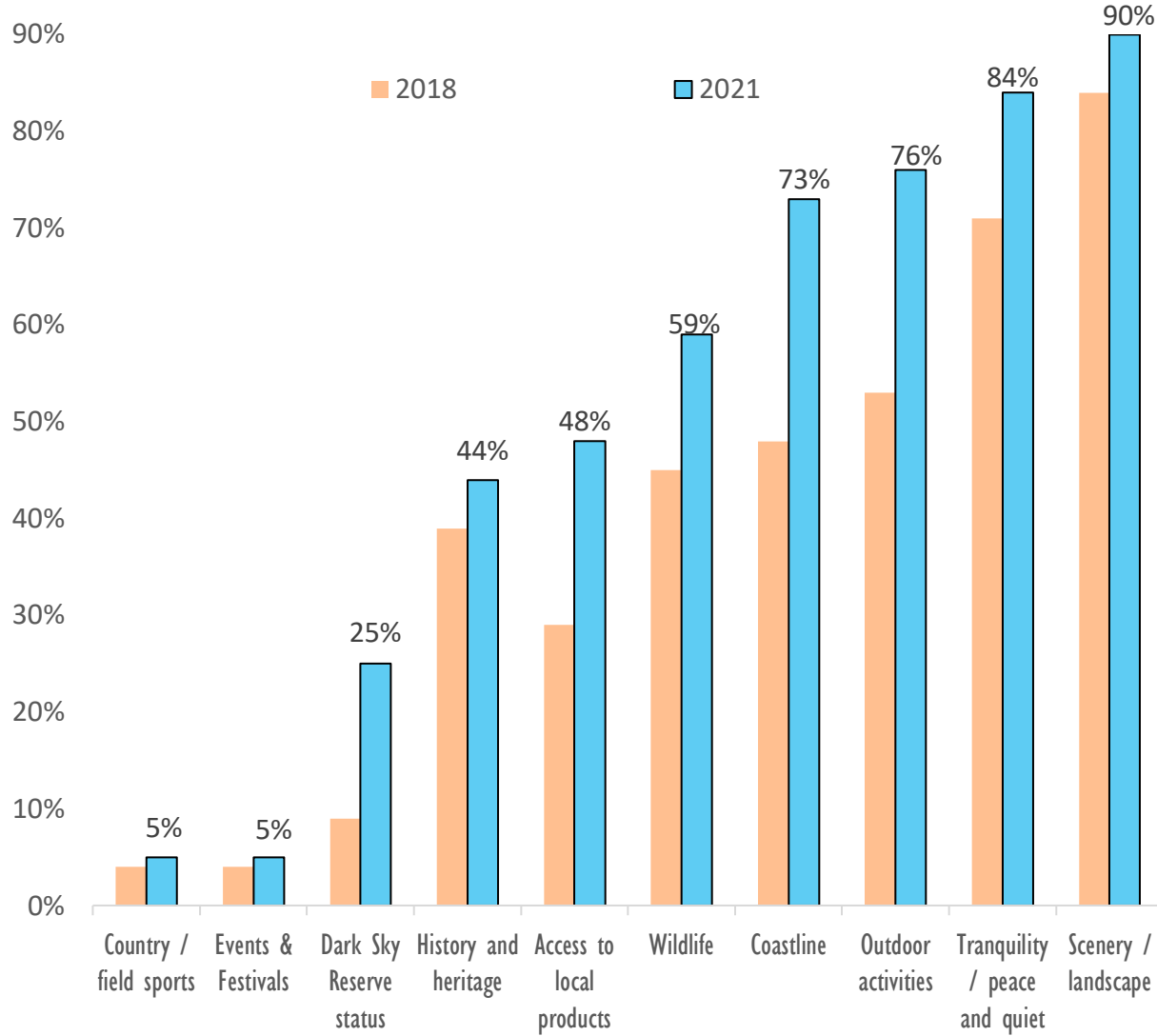


35% of all visitors have reported use of either a **National Park Centre** or **Visitor / Tourist Information Centre** in the area, with greater use by staying visitors than day visitors. Overall this is a decrease by 10% since the 2018 survey. Local centres have also reported a fall in recorded visitor numbers using their facilities since reopening post Covid-19 lockdowns, especially at the start of the season. In many cases footfall later in the season was beginning to match pre pandemic levels. Increased connectivity and availability of information online may also have contributed to this drop.

The perceived quality and usefulness of **National Park Authority publications** such as Pocket guides and the Exmoor Visitor is high with over 90% rating both their quality and usefulness as 'Good' or 'Very good'.

A core purpose of the National Park is to promote opportunities for the **understanding of the special qualities** of the area. The vast majority of visitors reported an increase in their understanding of landscape as a result of their visit and around two thirds reported an increase in their understanding of wildlife and heritage. 38% also reported an increased understanding of the area's culture.

# Primary attractors



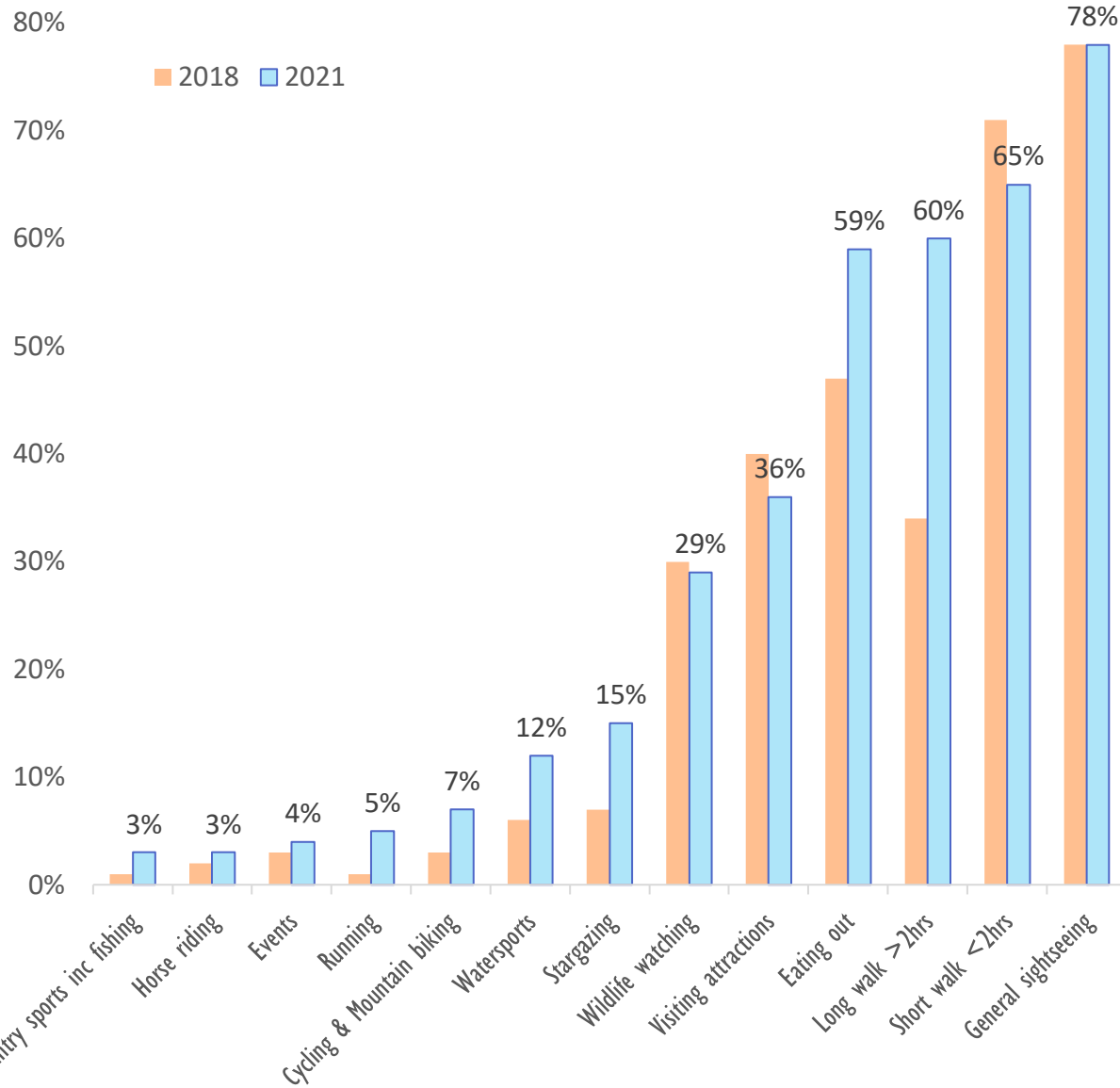
As might be expected for a rural destination the majority of visitors are attracted to the area by the natural environment, this is likely to be especially true post Covid with a general trend observed nationwide of increased interest in countryside and rural visits above other destination types.

The top three attractors remain the same as previous years with the scenery / landscape being an attractor to 90% of all visitors, and tranquillity 84%. There has been a further significant rise in the number of people citing the opportunity for outdoor activities as an attractor up from 33% in 2016, 53% in 2018, to 76% in 2021 making it the third top attractor (quite possibly driven by increased demand to utilise the outdoors as a result of Covid), closely followed by the coastline and wildlife.

Of note there has been an increase in the percentage of visitors citing each individual attractor to the area.

The last 2 to 3 years have seen a specific focus on the promotion of local produce and the area's Dark Skies as tourism assets and the significant increases in 'Access to Local Products' and 'Dark Sky Reserve status' as primary attractors could be evidence of the success of this work.

# Activities undertaken

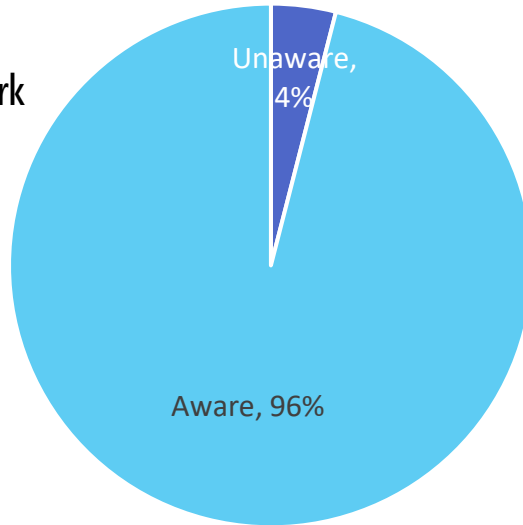


**General sightseeing** and **short walks** remain the top activities undertaken by visitors. The third top activity in 2021 was **long walks** (over 2 hours) up from 5<sup>th</sup> place with a large increase from 34% (2018) to 60% (2021). This is likely to be attributable to the impact of Covid-19 – whilst there have not been any significant declines in specific activities undertaken it is likely people spent more time walking and enjoying the outdoors than previous years. **Eating out** saw an increase from 47% to 59%, possibly as people sought to make up for lost opportunities during the previous 12 months.

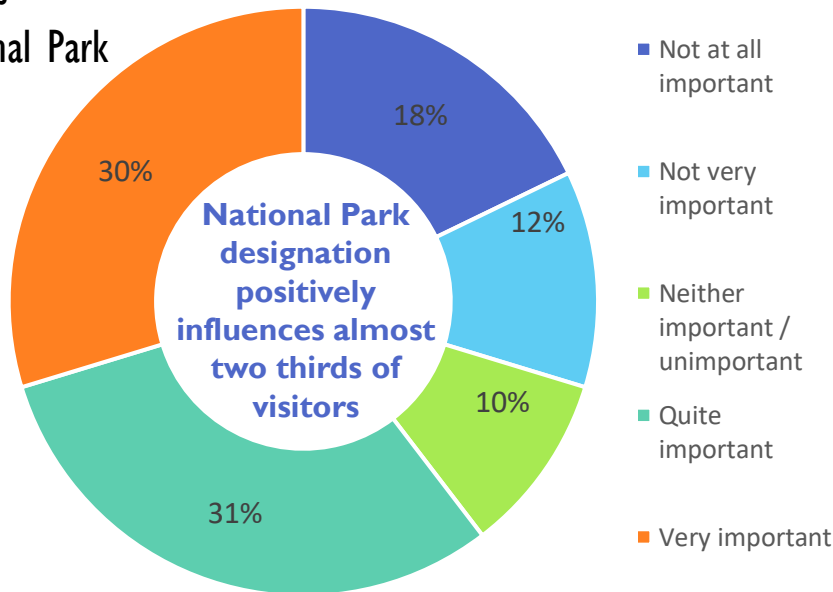
**Wildlife watching** and **visiting attractions** were the next most popular activities undertaken, some way ahead of a variety of other more niche activities such as **stargazing**, **outdoor activities** and **events**, although all saw an increase in the numbers reporting to have undertaken these activities.

# National Park designation: awareness & influence

Awareness of Exmoor's designation as a National Park before a visit



Importance of Exmoor's designation as a National Park in choosing to visit



**Awareness** of Exmoor as a National Park remains high with 96% aware that the area is designated as such prior to a visit.

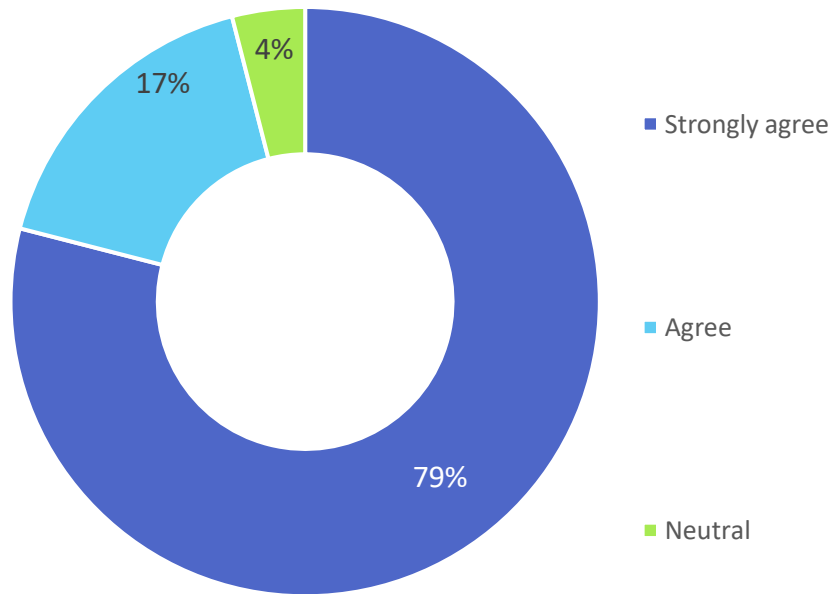
Just under two thirds of visitors state that the **National Park designation** was important in choosing to visit the area. This is quite a stark decrease from previous surveys and possibly reflects the more limited travel options available to people who were first and foremost drawn by the opportunity to get away somewhere and drawn to open spaces over and above the designation per se.

The majority of visitors however were still positively influenced by the designation. National Parks, whilst different across the globe, are an internationally iconic brand and Exmoor's association with this brand should be maximised in terms of marketing appeal.



# Perceptions of Exmoor National Park

“The National Park seems well managed and cared for”  
Do you agree or disagree?



## Recognition of the Exmoor brand identity



96% of visitors perceive the National Park to be **well managed and cared for**, with no one stating they did not feel it was well managed or cared for. A number of comments were made at the end of the survey with visitors stating how they like the National Park as it is and do not see any need for any specific changes or improvements.

Exmoor was identified through South West Tourism research as one of the strongest rural brands in the South West (after Cornwall, Devon and Dorset). The **Exmoor brand** was launched in 2014 and there have been recent efforts to engage businesses to further utilise the brand and the opportunities it offers. Recognition of the **brand identity** has risen to its highest since launch with 67% stating they recognise it.

# Impact of Covid-19 on visitor trends

Throughout this report we have highlighted areas where we've seen a shift in visitor behaviour and responses which are potentially attributable to the Covid-19 pandemic, including:

- A slight increase in younger visitors, a more diverse audience and a decrease in organised tours
- A significant drop in inbound visitors
- An increase in private transport usage
- An increase in the proportion of visitors coming for the first time, or the first time in over 3 years
- Increased use of the internet to obtain up to date information in a period of rapid change
- A more significant growth in key attractors to the area and activities undertaken in relation to the great outdoors
- A greater proportion of staying visitors vs day visits

There is no doubt that the pandemic has had a significant impact. No local resident, community, business or visitor will have been unaffected. It is perhaps surprising therefore, especially given some of the anecdotal observations discussed locally, that the results do not show a greater change in response to the pandemic. However this is also in line with the 2020 STEAM results (measuring the volume and value of tourism), which suggest the first summer after the initial lockdown did not see such an increase in volume as had been suggested by some on the ground.

This years survey also asked **whether visitors were likely to have been in Exmoor if it wasn't for the impact of the pandemic**. Over 90% stated that even if it wasn't for Covid they would've still visited Exmoor, with just 8% stating that they were visiting as a result of Covid-19 impacts. Of these 79% reported that they would otherwise have undertaken an overseas trip, and 21% a visit elsewhere in the UK.





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Further copies of this report, full data tables and a summary infographic  
can be downloaded free of charge as PDF documents online:

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