



# **Exmoor Tourism Business Survey 2011**

**March 2012**

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**1. What is the name of your business (optional). We may contact you if we can offer a useful response to any comments or suggestions you make, but please be assured all survey results will be published anonymously.**

Not published

**2. What is the primary nature of your tourism business?**

	2011	2010
Serviced Accommodation provider	39%	30%
Non-serviced Accommodation provider	22%	33%
Information provider	2%	6%
Food / drink outlet	7%	4%
Attraction / Activity provider	25%	23%
Retail	5%	2%
Other*		1%

**3. In which area is your business located**

	2011	2010
Exmoor National Park	63%	73%
West Somerset	18%	12%
North Devon	10%	11%
Mid Devon	8%	2%
Other*	1%	2.5%

**4. Do you have membership with any of the following local tourism groups?**

	2011	2010
Exmoor Tourist Association	59%	66%
North Devon +	31%	31%
Porlock Tourist Association	6%	17%
Dunster Chamber of Commerce	3%	3%
Exmoor to Sea (attractions)	6%	5%
Exmoor Farm Holiday Group	6%	15%
Minehead Hoteliers Association	0%	3%
Lynmouth Association for Commerce and Tourism	9%	19%
Combe Martin Tourism Association	3%	3%
South Molton Tourism Association	3%	3%
Somerset Tourist Association	9%	14%
Other*	15%	8%

\*WACET, North Devon Farm holiday Group, Museums in Somerset, Lyn TIC.

**5. Approximately how many full time equivalent staff do you employ? e.g. 2 part time = 1 full time equivalent, 2 full time seasonal staff working six months = 1 full time equivalent etc.**

Mean average = 3.5.

**6. Compared with the previous 12 months is the number of people now employed in your business...**

	2011	2010
Higher	14%	13%
About the same	66%	79%
Lower	20%	8%

**7. How would you rate the volume of business that you experienced in June to September 2010 compared with the same period in 2009? Please use the comments option to describe the factors you feel led to any change.**

	2011	2010
Increased by 10% or more	12%	23%
Increased by less than 10%	20%	7%
About the same	24%	33%
Decreased by less than 10%	27%	17%
Decreased by more than 10%	17%	19%

- seem to be getting a few guests less each year Economic situation
- This year we noticed alot of the bookings were made very late
- Very poor May and June
- During these months we operate at almost full capacity
- We had to turn down 50 bookings as we are a small group and need more members.
- Terrible decrease in numbers due to general crisis or/and unfair competition
- After a slow start to the season, we have done very well and are still quite busy, even in December

- Lower demand for higher value products due to global climate but this affects hnw folks less than most folks
- Accommodation up 17%  
Restaurant trade down 10.5%
- We did have a good patch during this time but the rest of the year has been very poor. The good weather helped during the summer and also special offers
- Reasons:  
Weather, recession reducing disposable income, financial uncertainty
- We have added additional bedrooms and have seen significant increases in occupancy this year
- We believe that by not charging an entry fee the Exmoor Pony Centre makes a desirable destination for families interested in the Exmoor pony breed but on limited budgets due to current economic pressures.

**8. For accommodation providers only: Approximately what proportion of your business was accounted for by short breaks (1 to 3 nights) over the last 12 months?**

	Serviced	Non Serviced	ALL 2011	ALL 2010
Less than 10%			21%	21%
Between 10% and 25%			11%	13%
Between 25% and 50%			11%	11%
Between 50% and 75%			29%	19%
Between 75% and 90%			14%	21%
Over 90%			14%	15%

**9. For accommodation providers only: It is widely regarded that booking lead times are getting shorter. Do most of your bookings, on average, take place...**

	2011	2010
On Arrival	0%	2%
Day before arrival	0%	0%
2-3 days before arrival	4%	2%
Up to a week before arrival	7%	4%
Up to 2 weeks before arrival	14%	14%
Up to a month before arrival	39%	40%
Up to 3 months before arrival	36%	24%
Up to 6 months before arrival	0%	10%
Up to a year before arrival	0%	4%
Over a year before arrival	0%	0%

**10. On average where do the majority of your overseas visitors come from? Please choose top 3 options only.**

	2011	2010
Ireland	12%	8%
France	23%	21%
Netherlands	53%	61%
Belgium	9%	21%
Germany	82%	74%
USA	29%	21%
Canada	6%	3%
Italy	6%	3%
Scandinavia	9%	5%
Austria	0%	2%
Australia	15%	17%
New Zealand	3%	6%
Switzerland	0%	2%
Spain	0%	2%
South Africa	0%	2%
Luxembourg	0%	2%

**11. Have you seen, as widely predicted, an increase in overseas visitors over the last 12 months?**

	2011	2010
Yes	38%	40%
No	62%	60%

**12. What percentage of your visitors are from overseas?**

Mean average = 9.8%.

**13. For non-accommodation providers only: What percentage do you estimate of your visitors are on a day trip? (i.e. not staying within the Greater Exmoor area)**

Mean Average = 24%

**14. How important is it to your business that you are based within, or close to, a National Park?**

	Very important	Important	Neither important or unimportant	Unimportant	Very unimportant
2011	43%	35%	18%	0%	2%
2010	45%	39%	13%	3%	0%

**15. Do you promote the 'special qualities' of Exmoor or use the National Park in your marketing and to guests whilst here?**

	2011	2010
Yes	90%	93%
No	10%	7%

- Of course! We offer promotional literature, advise events verbally and produce notice board bulletins
- Brendon Hills industrial heritage in particular
- Wall displays, Website, Talking
- Our kit colours are based on the colours of Exmoor, Brendons and Quantocks ie. green, gold and purple.
- We are in the strange position of being on the coast, a couple of miles from ENP, The Coleridge Way and The Quantock Hills and many web advertisers won't allow us to be in three separate sections so we have to pick one, usually "the coast"
- We always encourage people to use Exmoor Websites and actively promote the bus schemes in the area
- We see a dramatic increase in door numbers when there is a local event
- Particularly the new dark sky which has generated several articles recommending the old rectory hotel in the national press

**16. To the best of your knowledge what are the main attractors to the area for your customers?**

	2011	2010
Scenery / landscape	87%	96%
Coastline / beaches	47%	53%
Tranquillity / peace and quiet	84%	70%
Wildlife	66%	46%
Events / Festivals	21%	18%
Attractions	21%	11%
History / heritage	26%	13%
Quality of accommodation	45%	42%
Easy to get to	16%	8%
Access to local products	11%	5%
Country and field sports	16%	9%
Outdoor activities	34%	42%
Status of Exmoor as a National Park	34%	32%
Other*	8%	4%

\*Old England atmosphere, independent businesses, maritime history.

**17. To what extent do you agree or disagree that local events, shows, sporting events and festivals benefit your business? Please use the comment box to expand on your answer and to highlight any particular events / festivals you feel you have benefited from.**

	Strongly agree	Tend to agree	Neither agree / disagree	Tend to disagree	Strongly disagree
2011	16%	27%	37%	12%	8%
2010*	21%	29%	23%	22%	5%

- We ask all our guests when they book or arrive whether they are visiting for specific events but the answer is universally "no" and they do not know an event is on! Guests enjoy events while they are here, but they are an added bonus, not the reason for coming.
- Watchet music festival  
WSR steam galas
- Not aware that any visitors this year stayed because of a special event etc
- And many return after the event to see the area at leisure!
- More events would probably help - events suitable for the less active!
- Our customers come to Exmoor to appreciate the stunning scenery and tranquillity the National Park has to offer. in excess of 30% come from London and many others too are here to escape the stresses of city life. The last thing they want is noisy music festivals. Good food from local produce suppliers is also important and certain times of the year prove very challenging.
- West Somerset Railway and its galas.  
Dunster by Candlelight.
- The Cycling events tend to empty the streets and the enthusiast tend to move on to another vantage point once the cyclist have passed there fore amajor decrease in trade
- Golden Horseshoe Ride
- The question does not take into account the type of event in respect to the type of Business.  
Noisy 3rd class musicians music festival attract campers, cheap accommodation retail/booze shop and fish&chips;those are the business that benefits...etc.. etc' draw your conclusion all the rest is academic
- Watchet Carnival, Watchet Festival, The Iron Man and Dunster by Candlelight
- The majority of guests are business people visiting Hinckley Point power station
- The walking festivals are good but some festivals (such as the music events) seem to target people who don't usually come to our area and when they come they do not really like it
- We have received no bookings from people specifically attending festivals or sporting events. This is a shame but a sad fact

- People tend to come to escape to some peace and quiet from their busy lives. They don't therefore want to be bombarded with lots of events that attract lots of people.
- MAKE NO DIFFERENCE TO PEOPLE COMING TO STAY, IN FACT THE ONLY LOCAL EVENT/FESTIVAL NEAR US PUTS PEOPLE OFF! (HUNTERS INN MUSIC)

**18. How would you rate the importance of the following marketing avenues for your business? Use the comments box to expand upon your answer if you wish, highlighting particular examples etc.**

	Very important	Important	Neither important or unimportant	Unimportant	Very Unimportant
Your own website	84%	13%	3%	0%	0%
Area based websites (e.g. Visit-Exmoor.co.uk, NorthDevon.com, VisitSomerset.co.uk etc)	27%	54%	14%	5%	0%
Third party websites (e.g. Expedia, LastMinute.com, Trip Advisor etc)	17%	38%	32%	5%	5%
Your own leaflet / brochure	41%	24%	14%	13%	8%
Area based brochures (e.g. Exmoor 2010, North Devon & Exmoor brochure etc).	19%	47%	11%	22%	0%
Tourist Information / Visitor Centres	38%	30%	27%	5%	0%
Membership of local trade associations (excluding tourist information / visitor centre, covered above)	14%	27%	41%	13%	5%
Membership of regional / national associations and agencies (e.g. Farm Stay)	14%	19%	50%	9%	8%
Newspaper adverts	3%	20%	29%	31%	17%
Social media	6%	36%	33%	17%	8%

- Guests book on line and we find that they are more interested in a quality product rather than location - many of our new guests will consider the whole south west rather than exmoor specifically but once they get here, many return . Trip advisor and our own website are the biggest sources of businesses for us.
- Although we have only given a neither unimportant level,we have actually done several bookings directly from our Twitters
- On line contact now seems to be the norm but we like to be in a guide book as well for those folk who don't use the net or want extra reassurance
- Unfortunately we cannot advertise in Visit Exmoor etc
- You have to pay for all of these activities; some of these above mentioned should be free to local business and not left in the hands of third parties.
- We stopped printing brochures 3 years ago and now concentrate the majority of our marketing spend on search engine optimisation. During 2011 we had three requests for brochures and equally on-paper advertising is not cost effective. In excess of 90% of all new business comes through the internet and of that 80% is driven by our website.
- Guests find us through 3rd party websites then check us out on our website. We have had no direct business from area based websites/brochures so no longer use them (sorry). They may benefit us indirectly but are too expensive without identifiable bookings. Our view on area based websites/brochures would probably be different if we had the level of marketing that 'Brand Cornwall' has; but Devon/Exmoor doesn't

**19. In terms of area wide promotions by trade associations and support bodies please rank the following (1 most desirable, 10 least desirable) options.**

	Mean score	Rank
Area website (e.g. Visit Exmoor)	3.22	1
Area brochure	4.42	3
Articles in magazines and papers	4.19	2
Online articles	5.08	4
Social media (e.g. Twitter, Facebook etc)	5.56	5
Trade shows and exhibitons	6.36	8
Adverts in national press	6.06	7
Adverts in specialist press	5.61	6
Adverts in regional press	6.94	9
Sponsorship of events	7.56	10

- *Very un user friendly question*
- *You need to promote the online information by exposing people to the area through written media such as newspapers and tv programmes*
- *do not understand the question - too technical*
- *We found this very difficult to do as your priorities are very different to ours and the options were very broad based. It makes sense that as the UK has officially the largest percentage of online users in Europe that any web based activity must be a priority. We also think that the Dark Sky Reserve is a very important development and offers a huge opportunity to bring new visitors to Exmoor. We shall be featuring this on our website for 2012.*
- *Television marketing is missing from your list! Whilst we enjoy being tranquil, the area needs more long term quality visitors (the sort who go to Cornwall). Trade assocs/support bodies should be doing more high profile media promotion - and yes it costs more but.... Social media should be the easiest and most cost effective to achieve*

**20. Have you read, and found useful, any of the following publications in the last year? Use the comments box to expand your answer or highlight any ideas for improvement you have.**

Exmoor Visitor (visitor newspaper)	79.4%
Active Exmoor e-newsletter (summary of activities and active events)	70.5%
Exmoor National Park Authority tourism update (e-newsletter for tourism providers)	67.6%
Exmoor Tourist Association e-newsletter (members only)	50.0%
Exmoor Tourism Partnership annual update	32.3%
Exmoor, the Coast and Quantocks brochure 2011	44.1%

- *I am not sure if we are a member for Exmoor Tourist Association. It all fell apart a while ago but the Exmoor Visitor and Active Exmoor are excellent and if these support the association then it is good to be part of it*
- *ALL OF THE ABOVE SHOULD BE AMALGAMATED TO ENSURE THAT MORE EDITIONS COULD BE PRINTED THROUGHOUT THE YEAR WITH UPTO DATE INFORMATION*
- *Our guests particularly find the Exmoor Visitor very helpful and we also forward the Active Exmoor e-newsletter as appropriate to guests yet to arrive.*
- *The problem here is you are asking 2 different things in the same question. I've read ALL of these publications, but not necessarily found them useful!!! Exmoor Visitor needs a BIG overhaul..... It'S DULL, hasn't changed in years, photos are outdated, some events in previous years have been excluded.*
- *don't remember details - but all are informative*







- *Although we have weathered the economic situation well this last year I fear that continued downward spiralling of the economy will affect us sooner or later*
- *We're expecting things to get worse in line with the economy*
- *More visitors will holiday in UK*
- *We are facing a double dipped recession*
- *We are receiving greater recognition to the attraction and provide improving services to tourists*
- *It is difficult to predict the impact of yet another year of economic uncertainty. Our customers historically have been less affected by economic pressures but on occasion disappointed by the quality of the local shops and restaurants and choose not to return. A proportion of our local community revel in a music festival which is completely at odds with our customer base. We now close our business for three days to avoid the damage to our reviews reputation received in the past.*
- *i AM NOT INSPIRED BY THE LACK OF COMMITMENT TO THE FUTURE, ALL I SEE IS MORE DOOM AND GLOOM WHEN WE NEED EMPLOYMENT AND NOT DOLE QUEUSE*
- *We are very affected by the weather*
- *Would be improved greatly by more sunshine during July and August!*
- *The economic climate is poor. I think confidence is poor and holidays are a luxury that people cut back on. If they come away they go for self catering and bring their shopping with them so spend is less in the area*
- *We have seen fantastic growth over the past 4 years.*

#### **24. Please add any additional comments that you would like to make.**

- *Dark sky Exmoor is a powerful thing to make Exmoor stand out.*
- *The Dark Sky award was a great coup for the Park. We have added the logo onto our website.*
- *I think that the closure of the Minehead Tourist Information Centre will be detrimental to businesses. The seafront location, I assume, was ideal for tourists as it was a very visual site. I feel that we could now lose tourists, instead of trying to increase the number of tourists, as a result.*
- *Park needs to balance the passive the range of attractions to appeal to a wider public and to encourage repeat visits*
- *Exmoor has an exciting opportunity to offer the more discerning visitor an escape from the pressures of normal city life through its outstanding natural beauty, the tranquillity of the Moor and now the dark sky experience. This customer has money to spend within the area but will expect a high quality experience in return.*
- *I know we are on the fringe so feel free to ignore my comments that are personal.*
- *Transparency on grants received from EU*
- *I think a marketing scheme where people who stay in the area get a discount voucher may be good. Ie a Grockle Voucher so if you stay in a dedicated property you can have a 10% discount on shops, excursions. Perhaps guest houses could offer a free packed lunch or glass of wine - We need something that makes people feel they are getting a package*
- *so long as national advertising is maintained the season will only be as good as the weather allows it for that year!*
- *Exmoor is a beautiful and delicate area. Don't let the drive for money from tourism ruin what people come here for!*