

## The value of tourism to Exmoor 2003

South West Tourism has produced two reports (2001 and 2003) detailing the value of tourism to the South West region, its counties, unitary and district authorities.

Whilst visitors to Exmoor were included in the regional reports in the North Devon and West Somerset data, both of these districts cover a wider area than Exmoor making it difficult to gain a good estimate of the value of tourism to the national park alone.

QUEST commissioned South West Tourism's Research department to carry out a study, using the same methodology used in the regional research projects, to provide an estimate of the value and importance of tourism within Exmoor National Park.

### Exmoor 2003 Key Facts

#### Visits

237,600 trips by staying visitors

1,111,000 staying visitor nights

867,000 day visits

#### Spend

£49,711,000 spend by staying visitors

£19,396,000 spend by day visitors

£1,141,000 other tourism related spend

#### Jobs

1,894 jobs related to tourism spending

#### Trips, nights and spend by accommodation type (Domestic tourists)

|                                      | Trips  | Nights  | Spend       |
|--------------------------------------|--------|---------|-------------|
| Serviced                             | 75,400 | 227,000 | £17,705,000 |
| Self catering                        | 69,200 | 401,000 | £17,302,000 |
| Touring<br>caravans/tents            | 42,300 | 235,000 | £5,531,000  |
| Static caravans &<br>holiday centres | 11,400 | 57,000  | £2,272,000  |
| Group & campus                       | 2,700  | 12,000  | £550,000    |
| Second homes                         | 1,700  | 9,000   | £399,000    |
| Other                                | 3,400  | 13,000  | £678,000    |

|                                  |                |                  |                    |
|----------------------------------|----------------|------------------|--------------------|
| Staying with friends & relatives | 17,500         | 62,000           | £1,856,000         |
| <b>Total Domestic</b>            | <b>223,600</b> | <b>1,016,000</b> | <b>£46,293,000</b> |

#### **Trips, nights and spend by accommodation type (Overseas tourists)**

|                                   | <b>Trips</b>  | <b>Nights</b> | <b>Spend</b>      |
|-----------------------------------|---------------|---------------|-------------------|
| Serviced                          | 7,500         | 26,000        | £1,565,000        |
| Self catering                     | 1,800         | 31,000        | £262,000          |
| Touring caravans & tents          | 2,100         | 12,000        | £262,000          |
| Static caravans & holiday centres | 100           | 1000          | £22,000           |
| Group/campus                      | 600           | 9,000         | £345,000          |
| Second homes                      | 200           | 3000          | £68,000           |
| Other                             | 100           |               | £4000             |
| Staying with friends & relatives  | 1,600         | 13,000        | £328,000          |
| <b>Total</b>                      | <b>14,000</b> | <b>95,000</b> | <b>£3,418,000</b> |

Exmoor has seen reasonable growth in staying trips between 2001 and 2003 with a 6% increase in domestic staying trips and an 8% increase in overseas staying trips.

The domestic visitor market also witnessed increases in the amount of nights and tourism spend on Exmoor in 2003 compared to 2001 (21% and 20% increases respectively). In contrast to this there have been decreases in the amount of overseas nights (-3%) and overseas spend (-10%) on Exmoor indicating more overseas trips to the national park, but of shorter duration and subsequently spending less in the area.

#### **Number of accommodation establishments**

BED & BREAKFAST 54  
 FARM (SERVICED) 11  
 GUEST HOUSE 38  
 HOLIDAY PARK 19  
 HOTEL 60  
 INN 15  
 SELF CATERING 288  
 YOUTH & GROUP 5  
 TOTAL 490

Of the 490 accommodation enterprises on Exmoor approximately 48% offer inspected accommodation. Of those inspected, 6% offer 5 star accommodation, 49% offer 4 star accommodation, 31% offer 3 star and 9% offer 2 star accommodation.

## Estimated actual jobs related to tourism spend

|               |       |
|---------------|-------|
| Direct jobs   | 1,588 |
| Indirect jobs | 233   |
| Induced jobs  | 73    |
| Total         | 1,894 |

### The Cambridge Model

As the National Statistics Review of Tourism Statistics concluded, no data sources are infallible, particularly for tourism. Surveys are subject to statistical error; Standard Industrial Classifications were not created for nebulous concepts such as tourism; piloted regional accounts do not provide sufficient detail; mathematical models are estimates. That said, the strength of the approach outlined below is that it is consistent with and makes use of the most robust national surveys available, uses the most comprehensive databases available of tourism businesses in the South West and is based on a regional mathematical model that allows consistent comparison across different areas.

Essentially, the model uses a number of primary data sources ( see below) that measure both demand of tourism (consumer / tourist behaviours) and the supply of tourism products in the region. These data are available to different geographies. For example, the UKTS is published for counties whereas the accommodation stock data is usually maintained and can be generated at a local level for individual districts.

At the beginning of the process, South West Tourism, and the area authority scrutinise the primary data through a process of collaboration, whereby a final set of data is agreed that is considered to be the best representation of that location, at the geographic levels available. This includes collaboration with the area authorities on estimates of accommodation stock.

### Primary Data Sources used by the Cambridge Model

- ❖ United Kingdom Tourist Survey (UKTS) 2003 & 2001
- ❖ International Passenger Survey (IPS) 2003 & 2001
- ❖ United Kingdom Day Visits Survey (UKDVS) 2002/03
- ❖ South West Tourism TRIPS (accommodation capacity) database
- ❖ UK Occupancy Survey data 2003 & 2001
- ❖ Local data on language schools, second homes and boat moorings
- ❖ Visits to Attractions data (2003 where available)

- ❖ Regional and local earnings figures from New Earnings Survey (2002)
- ❖ Local employment totals from the Labour Force Survey

For the purposes of this report, the agreed sets of primary data were then brought together and modeled to produce a set of estimates of the value of tourism for Exmoor. The estimates produced are described in more detail on the following page and include trips, nights and spend by day and staying visitors, generation of employment, business turnover and Gross Value Added, GVA.