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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:

[www.exmoor-nationalpark.gov.uk/tourism](http://www.exmoor-nationalpark.gov.uk/tourism)
Between July and December 2018 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 survey followed up previous surveys of a similar nature conducted in 2005, and every two years from 2010.

Each survey was conducted face to face taking approximately 10 minutes. Interviewees were selected at random. Interviews were only completed with those respondents that neither 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.

<table>
<thead>
<tr>
<th>Location</th>
<th>Sample proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Challacombe / Chains area</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Combe Martin</td>
<td>2%</td>
</tr>
<tr>
<td>County Gate</td>
<td>2%</td>
</tr>
<tr>
<td>Doone Valley (Malmsmead / Brendon)</td>
<td>5%</td>
</tr>
<tr>
<td>Dulverton</td>
<td>3%</td>
</tr>
<tr>
<td>Dunkery Bridge / Dunkery Beacon</td>
<td>5%</td>
</tr>
<tr>
<td>Dunster / Nutcombe Bottom</td>
<td>9%</td>
</tr>
<tr>
<td>Haddon Hill</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Heddon Valley</td>
<td>9%</td>
</tr>
<tr>
<td>Lynton / Lynmouth</td>
<td>9%</td>
</tr>
<tr>
<td>Porlock</td>
<td>5%</td>
</tr>
<tr>
<td>Porlock Common</td>
<td>2%</td>
</tr>
<tr>
<td>Porlock Weir</td>
<td>8%</td>
</tr>
<tr>
<td>Simonsbath / Brendon Common</td>
<td>2%</td>
</tr>
<tr>
<td>Tarr Steps</td>
<td>9%</td>
</tr>
<tr>
<td>Valley of Rocks</td>
<td>12%</td>
</tr>
<tr>
<td>Watersmeet</td>
<td>7%</td>
</tr>
<tr>
<td>Webbers Post</td>
<td>8%</td>
</tr>
<tr>
<td>Wimbleball</td>
<td>6%</td>
</tr>
<tr>
<td>Winsford / Withypool / Wheddon Cross</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>

433 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.
The **age profile** of visitors continues to be skewed towards older visitors. Those aged 45+ now account for 70% of all visitors (59% in 2005).

There has been an encouraging increase since the last survey of those aged 25-44 from 9% (2016) to 16% (2018), whilst those aged 16-24 have dropped from 8% to 4%.

Younger adults aged between 16 and 44 have dropped as a proportion from 25% in 2005 to 17% in 2016.

Over half of all visitors to the area are coming as a **couple**. 15% (20% in 2016) came as a family unit and 20% (15% 2016) with **friends / wider family**. 3% came as part of an **organised group**.

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.

3% of visitors consider themselves to be a member of an **ethnic minority** compared to 10% nationally according to the Campaign for National Parks MOSAIC project.
Half of all visitors came from within the South West region (including the majority of day visits from home), and approximately two thirds from southern England. The proportional spread of domestic visitors has remained relatively consistent over the years.

Overseas visitors account for 9% of all visitors which is a slight drop from 12% in 2016 but still significantly higher than the 5% seen in 2005 when comparative records began.
93% travelled to the area by car, with 6% travelling via public transport or shared transport (e.g. coach trip).

Just 13% had used, or were planning to use, public transport whilst in the area. Staying visitors were more likely to use public transport during their visit than day visitors to the area.
Day and staying visitors

Day vs staying visitors

- 51% Staying (1 night or more)
- 31% Day visit from home
- 18% Day visit whilst on holiday elsewhere

Type of accommodation

- 29% Serviced (hotel, B&B etc)
- 35% Self catering
- 21% Caravan/Campervan
- 8% Camping
- 7% Staying with friends / relatives

Influences on accommodation choices

<table>
<thead>
<tr>
<th>Source</th>
<th>Of no influence</th>
<th>Slight influence</th>
<th>Strong influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peer reviews / recommendation sites</td>
<td>33%</td>
<td>40%</td>
<td>27%</td>
</tr>
<tr>
<td>Official star ratings</td>
<td>10%</td>
<td>43%</td>
<td>17%</td>
</tr>
<tr>
<td>Local award recognising commitment to the area</td>
<td>44%</td>
<td>47%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Exmoor National Park Visitor survey 2018

51% of all visitors were staying overnight in Exmoor for at least 1 night. This is relatively high compared to other destinations – e.g. 44% across Somerset (Somerset Tourism Monitoring Surveys 2015/16) and just 21% in the Peak District (2014/15 Peak District visitor survey). Following a decline in recent years the proportion of day visitors has increased with almost a third of visitors (31%) on a day visit from home, and 18% visiting whilst on holiday.

The relative remoteness of Exmoor is likely to contribute to the higher proportion of staying visits in comparison to other UK destinations.

Excluding those staying with friends and relatives (8%) there is a relatively even spread of accommodation types used by those staying overnight in the area – 29% using serviced accommodation, 35% using self catering and 28% camping / caravanning. Self catering has grown from 30% in 2016 with small losses seen in serviced accommodation and camping. Further research would be required to ascertain if this is owing to a rise in self catering options through channels such as Airbnb.

The influence of local awards, official star ratings and peer review sites has risen in all areas since 2016. Peer review sites now influence some 67% of choices (54% in 2016), official star ratings 60% (33%) and local award schemes 56% (29%).
Overall satisfaction continues to remain high. Those stating their overall experience of holidaying on Exmoor as ‘Good’ or ‘very good’ remains at 99% with 67% rating overall experience as ‘very good’.

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

Public transport is the least positive experience with over a third (37%) citing their satisfaction as ‘poor’ or ‘very poor’ which is a significant increase on 2016 (17%). Other areas where satisfaction has fallen include:

- Availability and cost of parking – rated ‘fair’ or below by 13% and 24% respectively.
- Availability and cleanliness of public toilets rated ‘fair’ or below by 31% and 27% respectively.

This shows a long term drop in satisfaction within these aspects of a visit since austerity measures were introduced in 2010. It is perhaps due to this being a nationwide issue that overall satisfaction has remained steadily high despite lower satisfaction with these particular aspects.

The percentage of respondents reporting low satisfaction with signage has fallen from 19% in 2016 to 11%, which correlates with the completion of an initiative to restore historic signposts across Exmoor.
Almost four fifths 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 allows 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 +77. Scores can range from -100 to +100. Anything over 50 is considered good, and scores over 70% considered world-class.

By way of comparison EasyJet has a NPS of -16 (NPSBenchmarks.com), Somerset +72 (2015/16 Visitor Survey), and Cornwall +73 (2016/17 Visitor survey). Research by Destination Canada suggests an NPS score form overseas visitors to the UK of +35 (Global Tourism Watch 2015).

It is worth considering that over a fifth of visitors obtained information prior to their visit from friends and relatives (growing to 24% of first time visitors) underlining the importance and value of personal recommendations (see page 10).
Exmoor continues to attract a high level of repeat visitors.

Just 14% of visitors were on a first time visit to the area with a quarter of all visitors stating 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.

Only 1% stated they were not planning to return – the primary reason given was a wish to explore other areas. 13% are undecided and 86% are planning on returning in the future.

An opportunity for growth is in attracting occasional visitors to visit more often (whilst the majority of visitors plan to visit again almost a quarter of staying visitors were on their first visit in over 3 years).
Visitors use a range of information sources prior to a visit.

Almost two thirds of visitors rely on a previous visit, whilst over a fifth acquire information via friends and relatives confirming the importance of word of mouth and personal experiences.

The use of the internet for information has remained stable at 41% of all visitors – the same as in 2014, but a marked increase on levels in 2005 at just 15%. The importance of the internet should not be overlooked given 79% of first time visitors use the internet for information and over half of all staying visitors.

More traditional methods of gaining information through articles in the press and use of Tourist Information Centres are significantly less influential. In relation to press articles it should however be noted that research indicates that there are several mediators in everyday 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).
Once in the area visitors are more likely to use traditional methods such as information centres, printed guides and information from local people as much as they would the internet.

Despite growth in internet usage and connectivity within the Exmoor area less than a third of visitors use the internet during a visit to obtain information. Of these two thirds are accessing via a smartphone or table, with a third using a laptop or PC.
Use of National Park Centres and Visitor Centres

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

- Yes: 45%
- No: 55%

Perceptions of Exmoor National Park Authority publications

<table>
<thead>
<tr>
<th>Quality</th>
<th>Very good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
<th>Very poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usefulness</td>
<td>39%</td>
<td>55%</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality</td>
<td>37%</td>
<td>59%</td>
<td>4%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Understanding of the ‘Special Qualities’ of Exmoor

Has your understanding of any of the following issues increased during your stay?

- Landscape: 72%
- Wildlife: 68%
- History: 70%
- Culture: 46%

45% 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 5% since the 2016 survey. This trend is reinforced by reduced visitor numbers reported by the centres, despite overall visitor levels on Exmoor remaining relatively stable. It is likely that the greater availability of information online both prior to and during a visit will 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 no ratings of ‘poor’ or ‘very poor’ and just 6% / 4% respectively rated as ‘fair’.

A core purpose of the National Park is to promote opportunities for the understanding of the special qualities of the area. Over two thirds of visitors report an increase in understanding in relation to the area’s landscape, history and wildlife, whilst almost 50% also report an increase in their understanding of the areas culture.
As might be expected for a rural destination the majority of visitors are attracted to the area by the natural environment, rather than being attracted via visitor attractions and events etc.

The top two attractors remain the same as previous years with the scenery / landscape being an attractor to 84% of all visitors and tranquillity 71%. There has been a significant rise in the number of people citing the opportunity for outdoor activities as an attractor up from 33% in 2016 to 53% in 2018 making it the third top attractor followed by the coastline and wildlife.
General sightseeing and walking are, by some margin, the top activities undertaken by visitors to the area. Eating out, wildlife watching and visiting attractions are the next most significant activities undertaken with other activities being undertaken by much smaller numbers.
Are visitors aware of Exmoor’s designation as a National Park before a visit?

- Yes, 97%
- No, 3%

How important is Exmoor’s designation as a National Park in choosing to visit?

- Not at all important: 1%
- Not very important: 2%
- Neither important/unimportant: 1%
- Quite important: 42%
- Very important: 53%

Exmoor National Park Visitor survey 2018

Awareness of Exmoor as a National Park remains high with 97% aware that the area is designated as such prior to a visit.

95% of visitors state that the National Park designation was important in choosing to visit the area with over half stating this to be ‘very important’. 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.
96% of visitors perceive the National Park to be **well managed and cared for**. Just under half (47%) of visitors would **consider making a voluntary donation** to help keep Exmoor special whilst a fifth would **consider volunteering** to help local conservation projects.

Exmoor was identified through South West Tourism research as one of the stronger rural brands in the South West (after Cornwall, Devon and Dorset). The Exmoor brand was launched in 2014. Recognition of the **brand identify** has dropped since the 2016 survey when 63% stated that they recognised the logo, with just under 50% now stating recognition. This may have been a result of concerted effort to ensure widespread adoption of the new brand when it was first established with a drop off in activity in recent years. Nevertheless the levels of recognition are on a par with other destinations – for example in the Somerset Tourism Monitoring Survey 2015/16 - conducted across the whole of Somerset - 50% recognised the Visit Somerset logo and 48% the Exmoor logo).
Associations with Exmoor

Top 3 words that came to visitors mind when thinking of Exmoor