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[www.exmoor-nationalpark.gov.uk/tourism](http://www.exmoor-nationalpark.gov.uk/tourism)
Between July and December 2016 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.


Please note the results presented refer to actual responses – if for some reason 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.

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 locations 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>Combe Martin</td>
<td>3%</td>
</tr>
<tr>
<td>County Gate</td>
<td>4%</td>
</tr>
<tr>
<td>Doone Valley (Malmsmead / Brendon)</td>
<td>3%</td>
</tr>
<tr>
<td>Dulverton</td>
<td>7%</td>
</tr>
<tr>
<td>Dunkery Bridge / Dunkery Beacon / Webbers Post</td>
<td>6%</td>
</tr>
<tr>
<td>Dunster / Nutcombe Bottom</td>
<td>9%</td>
</tr>
<tr>
<td>Exford / Landacre Bridge</td>
<td>3%</td>
</tr>
<tr>
<td>Haddon Hill</td>
<td>1%</td>
</tr>
<tr>
<td>Heddon Valley</td>
<td>6%</td>
</tr>
<tr>
<td>Lynton / Lynmouth</td>
<td>10%</td>
</tr>
<tr>
<td>Porlock</td>
<td>4%</td>
</tr>
<tr>
<td>Porlock Common</td>
<td>3%</td>
</tr>
<tr>
<td>Porlock Weir</td>
<td>5%</td>
</tr>
<tr>
<td>Simonsbath / Chains</td>
<td>2%</td>
</tr>
<tr>
<td>Tarr Steps</td>
<td>8%</td>
</tr>
<tr>
<td>Valley of Rocks</td>
<td>7%</td>
</tr>
<tr>
<td>Watersmeet</td>
<td>4%</td>
</tr>
<tr>
<td>Webbers Post</td>
<td>5%</td>
</tr>
<tr>
<td>Wimbleball</td>
<td>6%</td>
</tr>
<tr>
<td>Winsford / Withypool / Wheddon Cross</td>
<td>4%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>

536 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.
The age profile of visitors continues to be skewed towards older visitors. Those aged over 45 now account for 71% of all visitors (59% in 2005).

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, just over a fifth as a family group and 15% with friends. 7% came as part of an organised group.

10% 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.
Just under half of all visitors come from within the South West region (including the majority of day visits from home), and over two thirds from southern England. The promotional spread of domestic visitors has remained relatively consistent over the years.

Visits from overseas have grown consistently in recent years from less than 5% in 2005 to 12% in 2016. A similar scenario is seen in other National Parks (for example the Lake District has seen overseas visits increase from 7% in 2009 to 14% in 2015 (Cumbria Visitor Survey 2015).
60% of all visitors were **staying overnight** in Exmoor for at least 1 night – the mean average length of stay for staying visitors was 6 (unchanged from 2014). 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). Just over a quarter were on a **day visit** from home, with 13% visiting the area for the day whilst on holiday elsewhere away from home.

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 – 32% using serviced accommodation, 30% using self catering and 30% camping / caravanning.

Given the level of repeat visits it is perhaps unsurprising that there is not a higher level of influence of various quality / marketing initiatives with regard to **accommodation selection**. Anecdotal evidence arising from discussions with the surveyors suggest that practical details are likely to be the most influential beyond previous experience, such as late availability or acceptance of dogs.
Overall satisfaction continues to remain high. Those stating their overall experience of holidaying on Exmoor as ‘Good’ or ‘very good’ remains at 99%. However the proportion of those stating their experience as ‘very good’ has risen from 67% in 2014 to 76% in 2016. This increase appears to come primarily from staying visitors (81% rating as ‘very good’ compared to 69% in 2014) and first time visitors (78% compared to 47%).

In all areas satisfaction levels have increased between 2014 and 2016.

Public transport is the least positive experience. Whilst satisfaction is not as low as in the 2014 survey it is possible expectations are lower given the overall decrease in services throughout the country.

Perceptions of Value for Money have improved since 2005. Those rating Value for money in different sectors as good or very good rising significantly:
- Accommodation from 63% in 2005, 89% in 2014 and 93% in 2016.
- Attractions have also seen a rise from 82% in 2005 and 95% in 2016.
Exmoor continues to attract a high level of repeat visits.

Less than a fifth of visitors were on a first time visit to the area.

Of those on a repeat visit 70% come to the area at least once a year with a quarter visiting more than 4 times a year (11% of staying visitors, 44% of day visitors).
Visitors continue to use a range of information sources prior to a visit.

Two thirds of visitors rely on a previous visit, whilst 27% of visitors 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 over 70% of first time visitors use the internet for information and over half of all staying visitors.

Traditional methods of gaining information through printed guides, articles in the press and use of Tourist Information Centres remains broadly consistent with 2014 levels.
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 (28% of all visitors use either a computer or mobile device).

Comparing 2016 with 2014 there have been only modest changes with the exception of the use of **mobile internet** which has doubled in the past 2 years from 9% to 19% (and just 3% in 2010).

Use of **Tourist Information Centres** as a primary source of information during a visit has dropped since 2010 from 40% to 29%, which potentially reflects the decreased provision of such services.
Information and Interpretation

Use of National Park Centres and Visitor Centres

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

- No: 50% (All visitors, Day visitors, Staying visitors)
- Yes: 50% (All visitors, Day visitors, Staying visitors)

Perceptions of Exmoor National Park Authority publications

- Usefulness
  - Very good: 51%
  - Good: 44%
  - Fair: 4%
- Quality
  - Very good: 50%
  - Good: 49%
  - Fair: 1%

Understanding of the ‘Special Qualities’ of Exmoor

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

- Landscape: 79%
- Wildlife: 72%
- History: 66%
- Culture: 44%

50% 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.

The perceived quality and usefulness of National Park Authority publications such as Pocket guides and the Exmoor Visitor has risen (in 2010 33% rated the quality as ‘Very good’ and 31% the usefulness as ‘very good’ compared to 50% and 51% respectively in 2016. No one has rated either usefulness or quality as ‘poor’ or ‘very poor’.

A core purpose of the National Park is to promote opportunities for the understanding of the special qualities of the area. In the last 6 years between 2010 and 2016 the proportion of visitors reporting an increased level of understanding during their stay has increased as follows:

- Landscape 68% to 79%
- Wildlife 59% to 72%
- History 53% to 66%
- Culture 29% to 44%
NOTE: The 2016 survey used a slightly different methodology utilising tablet computers which allowed the order of options to be randomised for each survey. This appears to have resulted in a general decrease in the total numbers reporting particular aspects compared to previous years.

As might be expected for a natural attraction the majority of visitors are attracted to the area by the natural environment, more than by physical attractions or activities.

The overall ranking of factors has remained broadly similar with one exception - the top 3 primary attractors to the area have traditionally been scenery / tranquillity and the coastline (cited by respondents as a primary attractor to the area by 94%, 78% and 73% respectively in 2014). Wildlife in 2016 has come out as the third top primary attractor, just ahead of the coast.
NOTE: The 2016 survey used a slightly different methodology utilising tablet computers which allowed the order of options to be randomised for each survey. Previous surveys have had a static list.

Walking remains the single most popular activity undertaken by visitors to Exmoor with 70% participating in walks of up to two hours long and 43% in longer walks of over two hours.

Visiting towns and villages and sightseeing by car are the next most popular activities undertaken by 62% and 50% respectively of visitors. Compared to the findings of the 2005 survey there has been a decrease in those reporting visiting towns and villages as a main activity from 79% to 62%.
Perceptions & Awareness

Awareness of Exmoor as a National Park before visit

- No, 4%
- Yes, 96%

Recognition of the Exmoor brand identity

- Yes, 63%
- No, 21%
- Unsure, 16%

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

- Peace
- Wildlife
- Scenery

Exmoor National Park Visitor survey 2016

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

Exmoor has been identified through South West Tourism research as one of the stronger brands in the South West (after Cornwall, Devon and Dorset). The Exmoor brand identity was launched in 2014 and brand recognition amongst visitors is relatively high with 63% stating recognition of the brand (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).

The top 3 words that people associate with Exmoor correlate clearly with the primary attractors to the area e.g. its landscape, scenery, peace wildlife and coastline.
The overwhelming majority of visitors to the area travelled via private motor transport (e.g. car / motorbike) compared to 93% in 2010.

Once here 12% had used or were planning to use public transport at least once during their stay, compared to 17% in 2010 – during this time period there has been a significant decline in the number of public transport routes and services within the area.

55% of visitors travelled to the area from routes in the east; a third via the A39 from Bridgwater and 22% via the A358 from Taunton. Both these routes, but in particular the A39, will be subject to additional traffic and works related to the construction of Hinkley Point C power station.
**Destination choice**

Did you consider visiting any other destination instead of Exmoor on this occasion?

- No: 66%
- Another UK National Park: 7%
- Another destination in the south west: 14%
- Another UK rural destination: 9%
- Any other UK destination: 2%
- An overseas destination: 2%

**Future plans**

Are you intending to visit Exmoor again?

- Yes: 86%
- No: 13%
- Don’t know: 1%

Two thirds of visitors had not considered any other destination when planning to visit Exmoor on this occasion. Given the high levels of satisfaction and repeat visits this is perhaps to be expected.

Considering the third who had considered an alternative there is no single dominant competitor destination to Exmoor, with a mix of consideration given to other destinations in the South West, other UK National Parks or rural destinations.

86% reported that they intended to visit Exmoor again, and just 1% stated no intention (reasons given ranged from being on a once in a lifetime trip to not finding enough to do).
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