



**EXMOOR**  

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**NATIONAL PARK**

**Exmoor Tourism Business  
Survey 2010**

**March 2011**

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Exmoor National Park Authority

**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?**

Serviced Accommodation provider	30%
Non-serviced Accommodation provider	33%
Information provider	6%
Food / drink outlet	4%
Attraction / Activity provider	23%
Retail	2%
Other*	1%

\*Medical herbalist and reflexologist

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

Exmoor National Park	73%
West Somerset	12%
North Devon	11%
Mid Devon	2%
Other*	2%

\* North Yorkshire; Dorset

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

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

\*Devon Association of Tourist Attractions; Ilfracombe TIC; Devon Farms; Exmoor Producers; North Devon Farm Holiday Group

**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 = 2.7.

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

Higher	13%
About the same	79%
Lower	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.**

Increased by 10% or more	23%
Increased by less than 10%	7%
About the same	33%
Decreased by less than 10%	17%
Decreased by more than 10%	19%

- We are an event taking place annually. Entries are the only thing we can measure here, but we do provide a large amount of business for accommodation providers and other business outlets.
- This question is not representative, as this is the busiest time of the year, there is very little capacity opportunity, as an example I had only 9 rooms not let in the whole month of August, my total capacity in bed nights is 217 so no real uplift is possible, for businesses such as mine try capacity monitoring
- We noticed a distinct move to late booking of rides this year. In 2009 most summer holiday rides were booked by the end of June. In 2010, while we did fully book up, this was often very last minute.
- 27% increase. Small economical self catering unit.
- Very low bookings compared to this time most years.
- answer based purely on bed nights not on turnover
- Oversupply of high quality holiday cottages on Exmoor in relation to demand re awareness of Exmoor as a holiday/break destination and the oversupply has meant inability to recover cost inflation in our prices for last 2 years

- we were full for both
- Less visitor spend
- Last 2 weeks in June were very poor
- estimate - figures not to hand
- we only purchased the business in June 2010
- If visitors had booked earlier we would have been busier. We had people phoning a day or 2 before they went on holiday wanting accommodation, which we could not fulfil.
- June / July Down, September up
- Recession
- Disastrous Summer, not helped by a very wet August, the economic downturn and appalling transport links especially the M5
- We purchased our business in 2003 and have increased activity year on year. 2010 has been our best year so far
- The current recession
- Open from feb to end October. February was down and October is down but the rest is up August by about 20%
- We were fully booked for both years.
- The activities, i.e. water sports and fisheries held their own difficult times. However, secondary spenders, e.g. the cafe were 10% down on the previous season.
- Possibly effected by our program events. 2009 was our best year by far
- more people staying in UK and wanting exercise
- Fewer visitors to the area, accommodation with more vacancies.
- Less money to spend.. therefore lots of people buying essentials like food but not "shopping"
- It seems even less people know of West Somerset as observed through contact in Northern England via my second job - Chartered Marketer
- Increasing awareness of Treasure Trails and word of mouth recommendations has lead to an increase of 275% in sales over the summer period. The "Staycation" effect has led to what we call the "Daycation" effect - customers looking for value for money days out/activities to suit the whole family.
- We have no support infrastructure or communication for equestrian tourism in Exmoor National Park and find it very difficult to:
  - a) Keep up to date with what's happening
  - b) Motivate Exmoor to promote its horse tourism product
- Underlying decrease of 15% counteracted by major Gala at end of September 2010
- Not applicable, new business
- We ran a promotion for the whole of 2010 (3 nights for the price of 2) this brought some extra business in during the spring.
- I have opened a restaurant & B & B at the pub this year thus increasing trade.
- 2010 better weather; more families, perhaps more self-catering (car parks low over night); but noticeable thoughtfulness on purchases; complaints about parking costs and traffic wardens; fewer 300 buses

**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
Less than 10%			21%
Between 10% and 25%			13%
Between 25% and 50%			11%
Between 50% and 75%			19%
Between 75% and 90%			21%
Over 90%			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...**

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

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

South West	70.1%
South East	77.9%
Midlands	81.8%
East Anglia	10.3%
North East	7.7%
North West	12.9%
Scotland	1.2%
Wales	9.0%
N Ireland	0.0%

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

Ireland	8%
France	21%
Netherlands	61%
Belgium	21%
Germany	74%
USA	21%
Canada	3%
Italy	3%
Scandinavia	5%
Austria	2%
Australia	17%
New Zealand	6%
Switzerland	2%
Spain	2%
South Africa	2%
Luxembourg	2%

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

Yes	40%
No	60%

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

Mean average = 6.6%.

**14. 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 = 34.4%

**15. 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
45%	39%	13%	3%	0%

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

Yes	93%
No	7%

- I write literature which promotes the area and am currently researching a guide book.
- I have devised a 1 day tour of Exmoor which takes in both West Somerset, north Devon, Dulverton, Dunster which is offered to each guest
- ...but people who haven't visited before are invariably surprised by just how beautiful \*and varied\* it is here (there's a perception that 'moor' means bleak)
- Very much so, the link between Exmoor ponies and the National Park is a key element of our conservation and promotion aims for the breed.
- The national Park, the South West Coast path and countryside/outdoors in general are all important to our marketing
- Exmoor is somewhere to visit whilst staying in Minehead but is not the only place to visit from Minehead
- We believe it is important but don't really know. We promote it and also the relevant properties and know that some of the these 'properties' do attract our visitors
- I think are customer know what they are coming to that's why they come
- we promote actively all north Devon
- Exmoor National Park is a National Brand and should be promoted as an INTERNATIONAL brand along side and as well known as Yellowstone.  
Perhaps design a merchandising character that lives and plays within the park.
- Because we are not in the ENP only just outside but the one year we used ENP we were tactfully reminded we were not in it!
- The term 'special qualities' is vague and means all things to all men.  
All rural destinations promote the very same 'special qualities' as Exmoor
- As a chartered marketer I am aware of the need to align our marketing with a local brand otherwise we would be relatively unknown
- Our Exmoor Spy Mission Driving Trail is one of our most popular trails.
- Supply a video of Exmoor and books on walks.
- I advise visitors on places to visit on Exmoor for there natural beauty, or to see wildlife.
- The scenery etc are vitally important to many visitors, but some moan 'nothing to do' especially with bad weather. We help customers with guide/walking/map purchases, and answer as many questions as we can to encourage them to stay and tell family and friends that N. Devon is a good place to visit. We are conscious that we are 'ambassadors' and that unpleasant experiences can spoil a day out or longer.
- Visitor Centres very important on arrival to visit and plan holiday with me also.

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

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

\*Visiting friends/relatives x2; Budget group accommodation

**18. To what extent do you agree or disagree that local events, shows and festivals (excluding sporting events) 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
15%	40%	21%	21%	3%

- West Somerset needs like North Devon to have off peak events throughout the year which promotes tourism in the autumn, winter and spring  
The WSR brings many thousands of visitors into the area and should be heavily promoted, also could we have a dinner on the train, linked to accommodation package
- We do get some customers for events...but not many!
- Snowdrop Valley is a bonus for all the businesses in our village at a traditionally quiet time of year.  
We participate in the Exmoor Food Festival (have had a moderate amount of business from this) and promote the Walking Festival, but haven't had any business from that (disappointing). We put forthcoming events on our website, to emphasise that this is an area with plenty of different things going on
- Certain shows certainly mean that visitor numbers increase, such as Dunster Country Fair, Dunster Show and Exford Show.
- Most groups are booking for activities that they are arranging themselves (e.g. walking) or that they are asking us to arrange (e.g. conservation volunteering). I don't think users book specifically because of a local event, although they may visit that event once they are here.
- WS Railway is excellent
- Problem is always lack of co-ordination causing 2 or more events clash and then there is a shortage of quality accommodation in the area which can make visitors think about coming back
- We have little tangible evidence; we tend not to have guests who come specific because of/for an event, although we have return guest this year specifically for Dunster by Candle We think their promotion helps increase general awareness of Exmoor. Such events out of main season/school hols must be a help although more for short breaks rather than weeks. (The Iron Man is not a help because we have Sat to Sat weeks, can let the cottages for complete weeks then, most competitors etc want a short stay)
- most of are customers only find about events after they arrive
- We are surprised that they don't attract more visitors - they should have a stronger influence that they appear to have
- WSR Steam Gala and Dunster by Candlelight are prime.
- They tend to detract from the business in terms of activities, tea gardens, accommodation and day visitors. Local events do not benefit our business at all.
- Ironman is much better than Tour of Britain
- all good
- Very few visitors book just to attend the numerous events. The one exception the LLAMA music festival in June
- Our customers want to escape from the city to an inspiring peaceful location, they do not want the disruption of music that plays into the early hours.
- It is mainly the sporting events that we benefit from (Dunster archery, Triathlon etc).  
Dunster by candlelight provides a few visitors.
- Most of my bookings are repeats and come for walking etc
- The only local events that affect us are at a nearby pub, when noise is a problem
- I believe that things like the exmoor food festival will increase business in the future as it becomes better known nationally and grows, it isn't increasing business for us directly at the moment, but it is bringing people to the area and raising its profile which brings people here to stay. This year we have had a huge number of guests who have never been to Exmoor before.
- my guests come to ride over exmoor and are not interested in local events, shows or festivals
- They need to be well targeted. Some times a festival attracts the type of person who would not necessarily come to our area and this does not work on many levels, ie the Music Festival in Lynton and Lynmouth is not good.
- As a festival provider. We try to offer something unique to West Somerset. The quality of Festival generally is important to the area and it good to compliment each other
- I am biased! But the walking festival brings in over 600 individual walkers, half of which stay for 2 or more nights. This is proven by our own surveys, but is not necessarily realised by the providers, especially the self caterers who do not necessarily have the close communication with their hosts.
- Only tend to be staged in towns or larger villages
- In themselves they don't specifically benefit my business, but local events, shows and festivals benefit businesses by acting as a marketing tool raising the overall profile of Exmoor as a destination.  
They heighten potential visitors general awareness of Exmoor and its relative location within the South West.
- Mid Devon Show
- Cycling & Ironman events usually mean that we will be full

- The lack of national direct promotion of the area means that any event where there are large numbers of people benefits accommodation providers.
- Shows and events give us the opportunity to promote our business and meet our existing customers as well as introduce new customers to Treasure Trails.
- They should be a huge benefit but we are failing to attract visitors to such events
- N/A
- OUR LOCATION IS TOO FAR FROM ANY EVENTS FOR PEOPLE TO CHOOSE US TO STAY AT. ALSO THEY ONLY WANT TO COME FOR A DAY OR SO FOR SUCH EVENTS WHICH DOESN'T SUIT OUR BUSINESS
- Dunster Country Fair
- Had visitors who came for the walking festival in the Spring
- Parochial view - sometimes the event draws people away from our area. People only have so much money to spend, and can only spend it once.  
But - events are often a draw to encourage visitors, so on balance are a positive. Also if they come only for the event they may well be encouraged to return another time and stay longer.
- Dulverton Starlight  
2 Moors Festival  
Exford and Dunster shows

**19. To what extent do you agree or disagree that large / high profile sporting events and active events in the area benefit your business? Please use the comment box to expand on your answer and to highlight any particular events you feel you have benefited from.**

Strongly agree	Tend to agree	Neither agree / disagree	Tend to disagree	Strongly disagree
26%	19%	25%	23%	7%

- There are many events, not coordinated effectively to maximise the potential visitors  
The Red arrows clearly demonstrates the opportunity to bring into the area many thousands of visitors.  
To often we only find events when a guest books, we could and should be promoting events to encourage guests to return
- Ironman at Wimbleball brings a lot of business in. We get some business from the Golden Horseshoe, also from various cycling events. Nothing as a result of the Tour of Britain though!  
We've been told by several other businesses that tourism in the area has suffered as a result of the hunting ban
- Only sporting event that could have had an impact was endurance life. the problem is that users often only want a one night stay which would then leave me with an unsold night. Even though there was interest in the accommodation for this weekend I let it out to a non involved group as they would take an additional night.
- Events only produce short break bookings at times when full weeks are more usual i.e. tend to lose money if accepting short breaks for Ironman etc. No spin off bookings, such as Ironman training, have been noted.
- Large scale events e.g. Tour of Britain only raise the profile of area not necessarily bring in business themselves but may make people think that looks nice if reported well
- Iron man
- waters ports area so promotion has a knock on effect
- Can't think of an instance when a visitor has booked with us to experience such
- These semi-National cycle events have only been a pain and I see no benefit offset for this minority interest
- As above. The iron man and triathlon event on Exmoor as well as hunting and shooting.
- Tour of Britain and cycling a great draw.
- Ironman 70.3 has had huge impact in the five years at WIMBLEBALL
- Ironman 70.3, Tour of Britain, South Coast Rowing Regatta
- They will raise awareness of the area and some will produce a short glut of staying guests who will hopefully return later for a proper break.
- Active events fit very well with the general public's perception of Exmoor, again also acting as a marketing tool raising the overall profile of Exmoor as a destination.  
They heighten as well as differentiate potential visitors general awareness of Exmoor and its relative location within the South West.
- Tour of Britain brings in cycling groups coming for the event
- Only applicable where there is no need for any locally coordinated support activities. For instance the European tug of war event several years ago proved the area can promote itself. Here one of the judges who stayed at our facilities stated that they would never ever return to the area as nothing had been coordinated for them. To this end every other place they visit provides them with an itinerary for the area.
- Not aware of having had any visitors associated with such events
- Heddon's Mouth run  
Golden Horseshoe
- I have not seen any benefit from any sporting event held on Exmoor other than the D & W Foxhounds who I invite to meet at my pub once a year.
- Ironman and Wimbleball events

**20. 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	89%	8%	0%	3%	0%
Area based websites (e.g. Visit-Exmoor.co.uk, NorthDevon.com, VisitSomerset.co.uk etc)	43%	46%	11%	0%	0%
Third party websites (e.g. Expedia, LastMinute.com, Trip Advisor etc)	19%	31%	31%	16%	3%
Your own leaflet / brochure	38%	35%	15%	11%	1%
Area based brochures (e.g. Exmoor 2010, North Devon & Exmoor brochure etc).	29%	38%	16%	13%	3%
Tourist Information / Visitor Centres	27%	44%	16%	10%	3%
Membership of local trade associations (excluding tourist information / visitor centre, covered above)	15%	31%	26%	23%	5%
Membership of regional / national associations and agencies (e.g. Farm Stay)	12%	20%	27%	30%	11%
Newspaper adverts	9%	21%	21%	27%	21%

- Again this needs coordinating to maximise the potential market
- Web-based promotion is by far the most effective; area-based brochures tend to work well, as long as they are widely distributed; printed ads work in certain publications but need to be well targeted. Membership of associations gives access to a good range of promotional opportunities.
- Being part of a larger organisation a lot of our marketing is done on a national & regional level. My answers to the above would have been very different had the accommodation been independent
- everything helps
- Only when brochures are good quality do they attract people I once read that when brochures are in a rack you have less than 1 minute to attract attention therefore holiday brochure with bad front page like this years Exmoor 2010 will not make people say "I want to go there"
- Hard copy advertising is becoming increasingly un cost effective. Exmoor 2010 has great content and this mag. does produce 1-2 bookings appealing to a certain profile. Reprographic/design problem with Dulverton ads part means we won't advertise in 2011 -- won't risk same mistake at this cost level
- Have to use national letting agents to sell our properties
- Porlock Visitor Centre Very good
- Newspaper adverts are expensive/short lived... can we have a tv promo !!
- 95% of our new business comes through the internet. In the past 12 months we have had 5 requests for brochures and none of these converted to business. 90% of our marketing spend is targeted to getting our site found, the site is optimized and we only advertise on sites that benefit our rankings.
- I do think they're all very important but also extremely expensive and in many ways unaffordable. Membership in the first instance to any tourist organisation is a lot of money and when you add advertising, to afford an advert big enough to actually generate more business it's a lot to invest for potentially little or no return.
- I am a residential riding centre and when I advertise in locally only get day trippers who I can't take
- Being part of a national organisation our brand and national advertising brings most of our business
- Websites are for use as references one must first have a need to access data that such a web site would provide. Clearly if they are unaware that Minehead exists they would not know our website exists - Joe Erfurt Chartered Marketer MA; MCIM.
- The help with received from Area Tourism Partnerships such as South West Tourism, North Devon +, Visit Devon, Heart of Devon, etc, is invaluable.
- We belong to Devon Farms a farming co-operative which works well for us. As we have only one cottage we are reluctant to spend lots on advertising
- TIC no longer important to us for attracting new business but there role to help visitors once in the area is essential. Regional membership - Devon Farms very important to us. SWT/ETB of little benefit
- No advertising is bad, but word of mouth and recommendations go a long way
- As a retailer it is important that visitors come to Exmoor. Once here many will go shopping then it is up to us to ensure our shop is attractive and useful.

Missing from the above is attendance by e.g. ENP at travel and holiday exhibitions. The ENP should engage more directly in promoting Exmoor as a tourist destination

**21. Which of the following training areas do you / would you find most useful? Use the comments box to expand upon your answer if you wish, highlighting particular examples etc.**

	Very Useful	Useful	Unuseful	Don't know
General marketing	27%	40%	26%	6%
Online marketing	45%	37%	12%	6%
Quality assurance	17%	39%	36%	8%
Catering / hospitality	14%	39%	39%	9%
Sustainable tourism initiatives	25%	50%	19%	6%
Information about the local area	47%	39%	9%	5%
Business management	14%	42%	36%	8%
Legislation	18%	42%	30%	10%
Customer Service	22%	36%	34%	7%

- Training will vary from individual needs, we need to have national standards not local to ensure to the visitor of confidence in our product
- Marked some as unuseful because we have backgrounds in those areas!
- Items that are marked unuseful is only because I get this support from other areas of our organisation. being kept up to date with info on the local area is always good to pass on to users.
- Don't get involved in training much.
- Sustainable initiative fit with Natural Park
- We both benefit from our previous corporate and management experience but in our opinion many businesses do not react to changing customer needs nor is there any help in understanding how the UK tourism market has changed.
- All very helpful and important for the ongoing success of local business, particularly in such a competitive market.
- Marketing (PR - Advertising) is paramount.  
You have to attract visitors first and foremost.  
It is absolutely pointless investing meaningfully in the other training areas if this is not the main priority.  
If you don't blow your own trumpet no one else will.
- I am a local published author on most of the subjects put forward and could assist if need be with your endeavours.
- HAVING OPERATED A BUSINESS HERE FOR OVER 40 YEARS, TEND TO FIND TRAINING WORKSHOPS ARE COVERING SAME GROUND.
- For legislation it would be helpful to have information on any changing legislation, as it can be difficult for small isolated businesses to keep track of what is required.
- I'm not complacent but I'm comfortable with my own knowledge experience etc. Direct customer contact every day is remarkably good training!  
Also 'sustainable' is attached to too many activities. Take it as a given - ENP is a National Park and is expected to do the right thing for the environment. As a local govt. body it is expected to be cost effective and not wasteful.

**22. During the formation of the Exmoor Tourism Partnership the following priorities were identified (in order of importance) by the industry.**

*\*Partnership working*

*\*Marketing / information provision*

*\*Products*

*\*Transport*

*\*Infrastructure*

*\*Quality*

**Do you still agree with these priorities? Use the comments box to expand your answer if you wish.**

Yes	73%
No	27%

- I wish to add the year round program of events, and to promote festivals etc
- They're all interdependent and equally important. In general (compared to other areas we've visited) quality is pretty good - though this needs to be maintained of course
- Marketing need only be generic to the NP in order for use as service providers to benefit. If the profile of the ENP is raised then we should see an increase in visitors. would be good to see an extended season with all year round visitors
- quality should be top
- In view of economic climate it is vital Exmoor as a whole is promoted.
- I still feel that the unique selling point (USP)of Exmoor together with the coast is not fully marketed and it is the 1 thing that make exmoor different to Dartmoor and Bodmin
- Stop spending money internally -- use it externally to publicise and promote Exmoor.
- Marketing and quality should be first
- I see marketing and infrastructure as the main roles
- Marketing is crucial if you want to attract tourism to the area. Nationally, how many people could pinpoint Exmoor on a map of the UK? Provide the products that people actually want

Quality should be paramount in everything we provide

Transport links are essential at a time when people are being asked to reduce their individual carbon footprint, we have many enquiries from London where people can't believe they can't travel easily here using public transport.

- Quality should be no 1
- I would move quality, perhaps to no. 3
- Marketing should be the top priority. (Not sure what "partnership working" means.)
- The Product on offer should be No1
- All activity will stem from this. If this not right then all other activity will be wasted
- I think high quality brings a lot of people to this part of Exmoor during the non summer months.
- Should be Marketing/information, Transport, Infrastructure Quality, Products
- no idea
- The single biggest barrier to attracting/keeping school groups is the cost of transport.
- Marketing (PR - Advertising) is absolutely and unconditionally paramount.
- You have to attract visitors first, and foremost, and the rest to a large degree will take care of itself.
- What did Bill Clinton say - "It's the economy stupid" - The ENPA has NOT and does NOT adequately address the economy of Exmoor, namely tourism.
- Marketing & products are the most important .. most important is marketing we have an amazing place but not many people know about and come "by accident" !
- I wish people would get there facts correct. Marketing comprises of Products, Prices, Place & Promotion all active within an environment where Political, Economical, Sociological and Technological factors will determine the balance applicable to the appropriate investments and strategic deliverables.
- One cannot state the priorities as given above without stating why.
- The headings aren't clear - what is covered by 'products' and how do you distinguish between transport and infrastructure?
- QUALITY SHOULD HAVE A HIGHER PRIORITY
- I'm not sure what 'products' is in this context. A local govt body should not sell goods and services in competition with the private sector but should aim to provide or supplement services that are difficult for individual private enterprises.
- Marketing of Exmoor is vital, and ENP should spend a greater part of its budget directly in the tourism sector (and less in, say, planning where other local authorities that cover N Devon/W Somerset already have planning depts)
- Example of wasted advertising money - Sat's Exmoor food festival telegraph advert was a week or two - too late.
- Producing an expensive paper holiday brochure for a small region such as Exmoor is a huge folly

**23. Evidence shows a growing demand for 'green' or 'sustainable' tourism from consumers. Which of the following do you participate in or would you be interested in?**

	<b>I already participate in / am active in this area</b>	<b>I would be interested in developing this</b>	<b>I am not interested in this</b>	<b>Not applicable to my business</b>	<b>Don't know</b>
National 'green' accreditation (e.g. Green Tourism Business Scheme or David Bellamy Award)	7%	46%	34%	4%	7%
A local Exmoor green scheme (not currently available)	1%	65%	24%	1%	9%
Promotion of car free opportunities	14%	58%	19%	6%	3%
Significant use of local produce	35%	39%	10%	13%	3%
Increasing energy efficiency to reduce utility bills	22%	62%	9%	4%	3%

- It would be great to have some sort of 'green group' - to share tips & experience, also for buying power perhaps
- I use solar panels for our hot water and have not continued with the membership of GTBS due to the expense - although I still practice most of the Silver standards
- Any more initiatives which need form filling etc should be avoided - good practice should be made widely known and advice available - el rates might be negotiated for groups, thus making sustainable energy cheaper - local shops could be encouraged to offer sets of or baskets of local produce to holiday makers or cottage owners f.ex. DIY-breakfast basket, picnic for walkers ...
- will they ever improve A39 or train ?
- DUE TO OUR RURAL LOCATION WE ARE RELIANT ON PEOPLE USING THEIR OWN TRANSPORT TO GET HERE, PUBLIC TRANSPORT IS VIRTUALLY NO EXISTENT AND UNLESS THEY ARE COMING FROM BARNSTAPLE OR LYNTON IT WOULD TAKE THEM MOST OF THE DAY T USE PUBLIC TRANSPORT
- Green accreditation should be awarded on merit and not seen as a revenue raising or stealth tax opportunity.
- How can you promote car free opportunities without sufficient public transport?
- Wimbleball Lake has just been reassessed and maintained Gold GTBS status
- No point in any investment if this is to be a micro project where any strategic impact relates only to local kudos rather than on a national basis.
- We get some serious walkers but for the majority car free opportunities are not possible from here as we are 4 miles from bus stop!





- Provide packaged holidays with local themes; support local tourism association to therefore put something into supporting local promotion through guides and websites; Maintain and improve quality of accommodation.
- Promoting Exmoor overall not just ENP to a wider domestic audience.; Reduce duplication of information sources and providers - brochures/booklets/websites - streamline existing into single brand for W.Som ENP NDev; Easy to access and use car free infrastructure to benefit locals and tourists alike
- Continue to improve offer; Ensure value for money; Actively promote "things to do" to guests already arrived in the area.
- Marketing; PR/Advertising
- longer attractions operating time; cheaper ways to advertise; be less insular
- Sustainability; Partnership working; Value for money, quality services
- on line marketing; sustainable tourist activities; more marketing
- Ditto the above however with a greater emphasis on Corporate Objective. My thoughts would begin with a Gap Analysis in comparison with similar parks throughout the world; furthermore let us not forget the direct and indirect impact of investment where Busch Gardens FLA is a prime example. Here we have what began as a micro brewery (Budweiser)?
- Unity in selling Exmoor; Quality visitor experience; Cost value for money
- Affordability
- Integrate the various 'Exmoor' tourist associations/groups; Integrate the fragmented and diverse advertising publications which all compete for our expenditure; Increase networking to provide group support
- Historically small local tourist associations have been the most effective; Individual businesses should be taking responsibility for their own marketing.
- I have expanded my business in a time of recession using local workers and offer a quality product at a greatly reduced price to build up trade, I now plan to advertise this via a new web site and by advertising locally
- Direct marketing - as well as promoting their own business, support the increasing(!) direct-marketing activities of ENP at holiday exhibitions; Remember that a good experience for their customers helps the area and thus helps their business; Invest time and effort as well as money into their business. The opposite cannot succeed
- Keep prices competitive; Support local producers; Add that 'Extra' experience to the holiday
- Private sector is far better at this job at a lower cost, than the public sector.

**27. How do you feel about your business prospects now compared with this time last year? Use the comments box to expand on the reasons for your answer if you wish.**

More optimistic	15%
About the same	55%
Less optimistic	27%
Don't know	3%

- Over the last 2 years we have increased our bed nights circa 16%, this has been achieved by introducing very high standards of cleanliness, service and ensuring the needs of our guests are delivered
- It all seems to be very 'up & down' at the moment
- The overall impact of the economic situation would seem to have benefits for UK tourism in that a number of British people are choosing to holiday at home rather than travel abroad. In contrast, currency exchange rates make the UK a reasonably attractive proposition for those travelling from overseas. Interest in wildlife and particularly rare breeds has never been as high, and we are delighted to find that the vast majority of our visitors are keen to learn more a
- Am desperate to fill accommodation during off season mid weeks, but struggling to do so. Cannot see a way to change this at the moment.
- I feel the worst is still to come, more people are saving on their holidays!
- Very low bookings compared to this time most years.
- I think next year will be tough and am unsure about being able to recover cost increases in price increases, and worried about volume of business and profitability as I fear more obvious discounting will be done next year
- Banks?
- At least two more years of difficult trading
- We were 'cautiously optimistic' about the future last year and feel about the same for next year. Our fears focus on the lack of good restaurants locally particularly those offering fresh local produce. There will be visitors to Lynton next year, we just have to make sure that internet searches bring our B&B to the fore and that people choose us over the competition
- Accounts just produced for last financial year show slight drop in profit. This year is hovering around same turnover as last.
- I expect the economic situation to worsen in 2011.
- We've had a good 12 months bookings wise in our larger property but our cottage has had a terrible year and over all we're having to charge less and bookings in our cottages are tending to come much later which creates cash flow problems for creating more business and a lot of uncertainty. We've began to diversify even more last year which helped a lot. So who knows what next year will bring.
- Next year will be difficult
- We have maintained a high level of bookings in 2010 - 42 weeks booked of which 66% from previous visitors. 2011 bookings are already at 30% of 2010 total!
- Business has been up and the mood is better despite all the cut-backs. Those that are going to be affected directly by the Governments actions will not be able to afford to come, but those that still want to and are able to visit will still be looking for quality and that is what Exmoor has and needs to maintain and build on.
- Cutbacks, less disposable income
- There is single body within our county that seems to want to give a damn compared with the many organisations we have with a myriad of ego's.
- Apart from our special Gala in September 2010, the whole year has been 15% down on spend and 8% down on visitor numbers. Visitors are spending significantly less per head this year.
- We are desperately in need of housing our guests on the property but no chance of ever getting permission to do so. This will kill our business. Short sightedness of the parks authority to meet us 1/2 way
- I am very Optimistic, having studied the requirements of the village and the area in general
- Tough and uncertain economic conditions, but holidays are important to people. Overseas travel will be more costly for many. I hope that local authorities really will identify how the public's money can be well spent to help generate positive results. Will the weather improve? We can't control this; but the met office should stop their pessimistic forecasting - it puts people off travelling; and should stop long-term forecasts altogether.
- But promotion must be continued and funds be allocated for this from the Authority.
- Expect the economic situation to get far far worse next year, wobbly businesses will fall over

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

- The importance of promoting the coastal strip needs to be developed so visitors understand that in our area we can fully cater for their needs and then deliver "Added Value"  
There is also an opportunity to promote each others business i.e. leaflets in Minehead hotels for North Devon,
- I appreciate the initiative with the questionnaire and hope those seeing the analysis of the results will have the capacity and ability for the appropriate actions supported by the private sector
- None
- Perhaps an idea for Councils and National Parks to set up suggestion box for comments on how to reduce expenditure
- WHY DO YORKSHIRE/CORNWALL AND WALES DO SO WELL? FOLLOW THEIR MARKETING STRATEGY PLEASE
- we battle all the time to get visitors here the council are unhelpful towards signage. there is virtually no transport here. we were snowed in for 2 weeks last year and the council unwilling to help and now they have closed the A399, stopping visitors from getting to us from South Molton end.. We feel isolated from the outside world !!!

- Exmoor has much to offer the short break market that is not always conveyed nationally. Our first time guests are amazed that they were unaware of the beauty of the area. Unlike costly ineffective brochures, the internet offers a cost effective way of increasing that awareness to the majority who now research their breaks online prior to travel.
- Out of season visits are increasing (we have three bookings for November). Promotion to encourage this would be very helpful.
- Try and keep working with and supporting the ETA and ETP. Try and influence public transport to improve across the moor and help Moor Rover expand its operation.
- I would love broadband, I'm loosing new customers as I can't offer wifi to my guests and they have no access to a mobile network. better public transport would be great
- I would be willing to provide a 1hr presentation on marketing plans based on both an academic basis (I have an MA on the subject) as well as its impact upon a business plan (I own and operate a hotel)
- See above. We would like to either have a camping sight or be able to put up a small hostel to house 12 adults at most but no chance of getting permission. We have been informed that unless 80% of income comes from farming no plans to create holiday accommodation will be considered.
- I support local trade and produce, but try to offer something slightly different from similar businesses, to broaden the choice available, and fill requirement gaps where I see opportunities available to expand my trade which will hopefully lead to greater employment.
- It is important to ensure that the National Park continues to be 'special' and it is also important that residents of Devon and Somerset are not disadvantaged by all the work being done to ensure its 'special' status. A difficult balance!