



Exmoor Tourism Business Survey 2013

March 2014

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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?

	2013	2011	2010
Serviced Accommodation provider	41%	39%	30%
Non-serviced Accommodation provider	28%	22%	33%
Information provider	5%	2%	6%
Food / drink outlet	2%	7%	4%
Attraction / Activity provider	20%	25%	23%
Retail	3%	5%	2%
Other*	1%	0%	1%

*Charity

3. In which area is your business located

	2013	2011	2010
Exmoor National Park	56%	63%	73%
West Somerset – outside ENP	26%	18%	12%
North Devon – outside ENP	11%	10%	11%
Mid Devon	5%	8%	2%
Other*	2%	1%	2.5%

*Sedgemoor, Devon, Somerset & Cornwall.

4. How long have you been running your business?

	2013
Less than a year	1%
1-5 years	18%
6-10 years	34%
11 years or more	47%

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

	2013	2011	2010
Exmoor Tourist Association	53%	59%	66%
North Devon +	24%	31%	31%
Porlock Tourist Association	13%	6%	17%
Dunster Chamber of Commerce	-	3%	3%
Exmoor to Sea (attractions)	5%	6%	5%
Exmoor Farm Holiday Group	6%	6%	15%
Minehead Hoteliers Association	2%	0%	3%
Lynmouth Association for Commerce and Tourism	6%	9%	19%
Combe Martin Tourism Association	2%	3%	3%
South Molton Tourism Association	1%	3%	3%
Somerset Tourist Association	11%	9%	14%
Other*	8%	15%	8%

*Minehead Development Trust, Combe Business, DATA, Farmstay, Devon Farms.

6. Does your business hold any accreditations or awards? (Please only list those currently valid or in the case of competitive awards those received in the last 3 years).

	2013
Adventure Activities Licensing Scheme (AALA)	2%
Green Tourism Business Scheme	8%
Local quality award (e.g. LIST)	2%
National quality rating (e.g. Visit England / Quality in Tourism or AA)	63%
Visitor Attraction Quality Assurance Scheme (VAQAS)	8%
Visit England, South West or Visit Devon Tourism (Excellence) Award - winner or runner up	12%
Trip Advisor Certificate of Excellence / Travellers Choice	33%
David Bellamy Conservation Award	2%
Other*	21%

Social media award, British Horse Society and Association of British Riding Schools Accreditations, Trip Advisor Highly Recommended, approved family friendly accreditation award (pending), Ioo of the year – platinum, HRA Small railway award 2013, AA GUESTHOUSE OF THE YEAR 2011/12, Booking.com/ Best Loved Hotels of the World/AA Dinner Award, Arts Council, lapsed 1 year VB 4 breakfast award, Soil association national award

7. 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 = 4.3

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

	2013	2011	2010
Higher	7%	14%	13%
About the same	89%	66%	79%
Lower	4%	20%	8%

9. Over the last three years would you say that your overall business performance has:

	2013
Increased by 10% or more	24%
Increased by less than 10%	17%
About the same	38%
Decreased by less than 10%	15%
Decreased by more than 10%	5%

10. 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.

	2013	2011	2010
More optimistic	34%	11%	11%
About the same	49%	46%	55%
Less optimistic	14%	43%	27%
Don't know	3%	0%	3%

- *The economy is so unstable, none of us really know what to expect.*
- *We feel that the Town doesn't target its market potential. The beauty & serenity of the area is the true strength not the bucket and spade. The West Country is now a food destination but although we can bring in the affluent walking market who want the beauty of Exmoor to escape from the city, the towns facilities leave them disappointed. There isn't a good variety of food at the quality they expect. The first thing they ask is "where's the best fish restaurant?" There isn't one.*
- *In 2013 we carried an increased number of passengers and increased fares revenue by £100k compared with 2012. We continue to develop new attractions to grow different areas of the market.*
- *Advance bookings are about double the level at the same point last year*
- *House prices may be rising and the South East recovering but the rest of the UK is still struggling, pensioners savings are earning very little, there are more cuts to come and it will take a long time to really pull through.*
- *Very slightly less optimistic as this time last year we already had several weeks booked. This year we only have two, one of which is a regular one, this will be their 15th visit.*
- *Membership of our organisation is growing and confidence is going the same way.*
- *Business is not as good as this time last year had a lot more forward bookings.*
- *We do low key B&B mostly "word of mouth" and are quite happy with our gentle set up!*
- *Despite reports to the contrary we don't feel the economic climate has improved.*
- *We are trying to find ways to improve the situation*
- *More competition for accommodation. More difficult marketing trying to get the property noticed on the internet.*
- *Business is growing as our brand becomes more known & recognised.*
- *bookings not flooding in as they used to at this time of year. bookings down 20-30 % over past 4-5 years.*
- *We now have a conservatory to give undercover/inside seating allowing us to now open during inclement weather, and now autumn and winter opening. We also now have an additional trip boat with disabled access.*
- *WW1 commemoration and new displays should improve the visitor experience*
- *Becoming number 1 in the area on Trip Advisor has made a difference.*
- *We've only been running for just over a year so hard to compare with previous owners/years.*

11. How have the following aspects affected your business in the last year?

	Very positive	Positive	Neutral	Negative	Very negative
The weather experienced in 2013	16%	44%	22%	15%	3%
The current economic climate	1%	18%	39%	37%	5%
Status of Exmoor as a Dark Sky Reserve	1%	21%	77%	1%	0%
Increasing travel costs	0%	7%	40%	49%	4%
Improved partnership working amongst tourism bodies in the area	1%	20%	74%	4%	1%
National tourism support work	0%	5%	80%	12%	3%
Digital marketing / Social Media opportunities	15%	40%	40%	3%	3%
Current broadband coverage / speed	3%	9%	49%	28%	12%
Area promotional activity (e.g. PR work, TV adverts, web development)	3%	30%	59%	7%	1%
Staycations	1%	26%	67%	4%	1%

- *I'm not sure what Staycations are...but will google it!*
- *I think there is too much concentration on digital media too the detriment of established advertising, last year 1 in 12 of our guests did not have an e-mail address so brochures are still needed look at all major holiday companies, both international and domestic*
- *We feel that much more could be made of the Dark Sky Reserve particularly since the BBC Stargazing programmes. A major negative impact for us is that there is no transport between Lynton & Lynmouth in the evenings and as there is only one taxi, booking him is difficult. We are prohibited by law to assist our guests between the two towns without a taxi or private hire license. Also shops closing at 4.30pm doesn't help. The lack of mobile phone coverage is a real issue.*
- *We have an increasingly useful and regularly updated website with online booking facilities. We have developed a sizeable presence on Facebook and Twitter and in 2014 are launching a phone app. We are holding train fares for a third year at 2012 levels. We continue to attend travel trade shows to promote WSR, Somerset and Exmoor and have a 2000 strong database who receive a monthly electronic mail out.*
- *Have seen very little staycation evidence we are running at 2008 levels. Social media influence on holiday bookings seems questionable. Digital marketing is now massively competitive and dominated by large agencies and listing providers who can pay for top support and dominate search pages.*
- *Do not think travel costs have come into it. We always promote the cottage as somewhere to stay where you do not need your car again until it is time to go home. Other points n/a.*
- *Their is not enough advertising and marketing.*
- *Our Broadband is a joke.*
- *We don't feel that Somerset has benefited from any TV promotions.*
- *suspect that weather in 2012 had negative effect in 2013*
- *We offer more indoors than most holiday accommodation, hence the positive impact of poor weather in last three years*
- *The government decision to fine children being taken out of school has begun to impact with increasing numbers utilizing us at peak times*
- *Staycations- one of those buzz words- no increase in volumes for us. Self catering holiday- by calling it a staycation does it actually make any difference and mean any extra business!*
- *What are staycations? This is a new jargonised word I am not familiar with!*

12. 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?

	2013	2011	2010
Less than 10%	19%	21%	21%
Between 10% and 25%	19%	11%	13%
Between 25% and 50%	12%	11%	11%
Between 50% and 75%	16%	29%	19%
Between 75% and 90%	16%	14%	21%
Over 90%	16%	14%	15%

13. Are you happy with your current occupancy rates or would you like to see an increase or decrease at any of the following times of the year?

	Increase over 10%	Increase up to 10%	Happy with current level	Decrease up to 10%	Decrease over 10%
Summer months (excluding summer school holiday) e.g. June, July, September	25%	30%	46%	0%	0%
School summer holidays	20%	20%	59%	0%	0%
Autumn months (excluding Christmas holidays) e.g. October, November, December	34%	41%	21%	3%	0%
Christmas holidays	14%	20%	66%	0%	0%
Winter months (excluding Christmas holidays) e.g. January, February.	37%	42%	20%	0%	2%
Spring months (excluding Easter holidays) e.g. March, April, May	31%	44%	24%	0%	2%
Easter holidays	20%	26%	52%	0%	2%

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
2013	43%	39%	17%	0%	1%
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?

	2013	2011	2010
Yes	82%	90%	93%
No	18%	10%	7%

- *I do, but we are not part of it here.*
- *Would like to but feel National Park does not really work with/alongside Minehead*
- *We position ourselves as situated within the National park rather than mention Lynton & Lynmouth*
- *We display local promotional materials at our stations and take information with us when "on the road" at the Exhibition circuit.*
- *Through sharing of web and other social media posts on our website and social media pages*
- *Plan to produce new leaflet and will definitely promote Exmoor further.*
- *We have regular visitors to walk. 1 regular visitor to view dark sky.*
- *Emphasis on walking/cycling on website. maps, routes etc provided to guests - and discussions about where to visit*
- *Peace and quiet. Good Walking, Riding and biking*
- *Typical phrase is "Located in an area of outstanding natural beauty on the edge of Exmoor National Park and a short distance from the North Devon Coast..."*
- *Most important USP being in centre of ENP.*
- *We work with and promote other quality local businesses such as ---. We have a state of the art online concierge system which promotes the local area, recommended walks, local attractions, recommended places to eat.*
- *This is something I need to address in our marketing, as I personal Love Exmoor.*
- *We sell Exmoor related publications*

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

	2013	2011	2010
Scenery / landscape	94%	87%	96%
Coastline / beaches	50%	47%	53%
Tranquillity / peace and quiet	76%	84%	70%
Wildlife	49%	66%	46%
Events / Festivals	21%	21%	18%
Attractions	21%	21%	11%
History / heritage	33%	26%	13%
Quality of accommodation	67%	45%	42%
Easy to get to	17%	16%	8%
Access to local products	14%	11%	5%
Country and field sports	21%	16%	9%
Outdoor activities	46%	34%	42%
Status of Exmoor as a National Park	46%	34%	32%
Dark Skies	13%	Not listed	Not listed
Other*	1%	8%	4%

*Weddings, Hinckley Point,

17. Are you aware of the new Exmoor brand launched last year, and available free of charge to businesses that are members of a recognised tourism association to use?

www.exmoortourismpartnership.org.uk/brand

	2013
Aware and making use of it	12%
Aware and intending to use within the next 12 months.	25%
Aware but not intending to use.	15%
Not aware until now.	49%

18. Are you aware of the new National Park Centre at Lynmouth Pavilion and if so are you promoting it to existing and potential visitors to help them enjoy their Exmoor experience?

	2013
Yes - actively promoting	25%
Aware but not actively promoting	59%
Not aware of the centre until now	15%

19. 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
2013	21%	42%	27%	8%	1%
2011	16%	27%	37%	12%	8%
2010*	21%	29%	23%	22%	5%

- *West Somerset railway very important also local activities like dunster events archery and candlelight*
- *Snowdrop Valley, Ironman, Food Festival, Walking Festival, West Somerset Railway events*
- *The people who choose us come here for the beauty of Exmoor and to get peace & quiet. When there was a music festival we closed the business because of previous complaints and compensation to disappointed guests.*
- *These would be of more benefit if comprehensively promoted. Too many organisers assume a "Free Press" advert and a piece on a website will do the trick. In some cases "Minehead Summer Festival" being a prime example there has been an actual refusal to release information. Promotional material needs to be disseminated over a much wider area.*
- *North Devon Show, Cycling Tour of Britain (Exmoor - Barnstaple*
- *Golden Horseshoe, Exford Show, Dunster by Candlelight*
- *Used to get business from the local rally. Events give visitors something to do and make their stay more enjoyable but we don't think people come here just for the events but suspect that is through lack of promotion nationally. We try to promote them on our blog and facebook but while Dunster by Candlelight is very popular we get no business from it despite promoting it.*
- *They tend to be coast related*
- *Their needs to be more festivals, would love to see a food festival in Exmoor, not spread but in one spot.*
- *Communication is very poor and we are nor always aware or notified of these events.*
- *no evidence that they attract customers*
- *Golden horseshoeride*
- *No personal benefit but the area certainly benefits*
- *Exmoor Pony Festival - we've been able to offer activities two years in a row during the festival. Negotiations taking place now to work as activity provider during new music festival to take place in North Devon July 2014.*
- *We don't tend to benefit directly (i.e. increased business), but anything that is bringing people into the area /raising the profile of the area has to be a good thing.*
- *There is currently a lot for people visiting the area to do run by very small businesses, and so any event, show, etc takes potential visitors away from the full time businesses. It is impossible for us to benefit from any of the above.*
- *Most of our guests do not attend events unless encouraged by us. ~They are not the main reason for booking a holiday in Exmoor.*
- *To be honest, we don't seem to experience many guests when festivals etc with the exception of the 2 moors festival*
- *Golden horseshoe and Ironman are both great events*
- *Bridgwater Carnival brings a lot of people form all over the UK to this area. We are a little more remote to benefit from other events unless we hold our own which we do i.e. Charity Duck Races etc.*
- *Watchet Music Festival, WSR steam galas significantly boost footfall*
- *Golden Horseshoe Ride, Hunting, Shooting, Fishing, Cycling, Wildlife (deer), Simonsbath & Two Moors Festivals. Ironman etc and we promote Dark Skies, Dunster by Candlelight, Dulverton by Starlight, Exford & Hawkridge Shows.*

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%	2%	0%	2%
Area based websites (e.g. Visit-Exmoor.co.uk, NorthDevon.com, VisitSomerset.co.uk etc)	34%	49%	13%	3%	0%
Third party websites (e.g. Expedia, LastMinute.com, Trip Advisor etc)	16%	33%	27%	14%	10%
Your own leaflet / brochure	30%	35%	24%	5%	6%
Area based brochures (e.g. Exmoor 2010, North Devon & Exmoor brochure etc).	17%	33%	38%	6%	5%
Tourist Information / Visitor Centres	29%	38%	22%	8%	3%
Membership of local trade associations (excluding tourist information / visitor centre, covered above)	8%	28%	51%	13%	0%
Membership of regional / national associations and agencies (e.g. Farm Stay)	0%	16%	68%	8%	8%
Newspaper adverts	3%	14%	28%	34%	20%
Social media	26%	31%	26%	9%	8%

- *It's true, I am woefully rubbish at marketing. Kill me now.*
- *Print-based advertising seems to be becoming less and less effective. Directory websites also less effective than previously*
- *All promotional areas are useful but they must be kept up to date. Some of the local events websites are hopelessly jumbled. The value of TIC's is not fully appreciated. Websites are fine but direct local knowledge and contacts are invaluable.*
- *Exmoor Coast and Country when it operated in the old days was a major contributor to our business, since it was undermined no quality alternative seems to have appeared. We have supported a number but feel we get very little from them and are now subsumed into Somerset.*
- *Inclusion on the Green Traveller website seemed a good idea, but it's not a good site and it took me ages to find us, and I was looking for it specifically!*
- *Advertising on national accommodation providers websites are the most important.*
- *in addition to the above, I would say local partnerships are very important to us, package deals with a few local accommodation providers with links on their websites have been very important & successful for our business*
- *Most booking derived from own website .*
- *I do not do on line booking or use facebook nor do I wish to.*

21. 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)	2.4	1
Area brochure	4.7	4
Articles in magazines and papers	4.4	2
Online articles	5.1	6
Social media (e.g. Twitter, Facebook etc)	5	5
Trade shows and exhibitions	7.2	8
National Advertising	4.6	3
Adverts in specialist press (e.g. walking magazines)	5.6	7
Adverts in regional press	7.4	9
Sponsorship of events	8.7	10

- *Only the first 6 are of any noticeable value.*
- *I have rated adverts in local press highly but it needs to be targetted in areas where guest come from*
- *This category depends on which sector of the market you wish to reach. For the older demographic the national print media and face to face contact is crucial. The younger part of the market is interested in electronic communication.*
- *Website is 8 only because we have some good coverage there! Otherwise, it would be higher on the list.*
- *Web based searching now generates so much that it is almost unhelpful and is dominated by major agencies and listing providers. People use a mixture of paper and digital media to identify where they want to go. A strong mailing list of those who enjoy and use Exmoor with a quality presentation of accommodation and things to do mailed in time for the season will still work well.*
- *repeat Jonny Kingdom!!!*

24. In view of the current economic situation what do you think the top 3 priorities should be for the private sector to develop tourism in the Greater Exmoor area?



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

- Not sure surveys like this are any good
- More and more enquirers for self catering accommodation are asking for broadband access.
- ENP should actively seek opportunities for exposure in TV and film locations i.e. TV serialisation of Secrets of Crickley Hall written and based in Lynmouth filmed in Derbyshire?
National TV coverage for Dartmoor cycle way - Exmoor too?
BBC national feature on Northumberland getting Dark Sky status? Consider Verity's positive impact on Ilfracombe
- Being out and about on the road at regular intervals I see just how hard other people are working to get people to spend their limited leisure budget with them. There is a lot of complacency locally about continued visitor numbers and that someone else will deliver business to them and that must change.
- I know we don't have the budgets Wales, Scotland, The Lakes and even the Yorkshire Dales have and we need to be more innovative but Exmoor as a National Park and place to visit just does not seem to gather that level of attention. The more people hear about us the more chance they will want to come here.
- We would like to feel more part of Exmoor but always feel a bit excluded being situated outside of South Molton. We would love more events in this area .
- 2013 was a very good year for some accommodation providers. It was not a good year for most High St businesses
- The ENP is a great help to small businesses
- PR is key and yet ENPA and local businesses do not appear to have a common approach. ENPA need to bolster PR and push local businesses to offer full support.