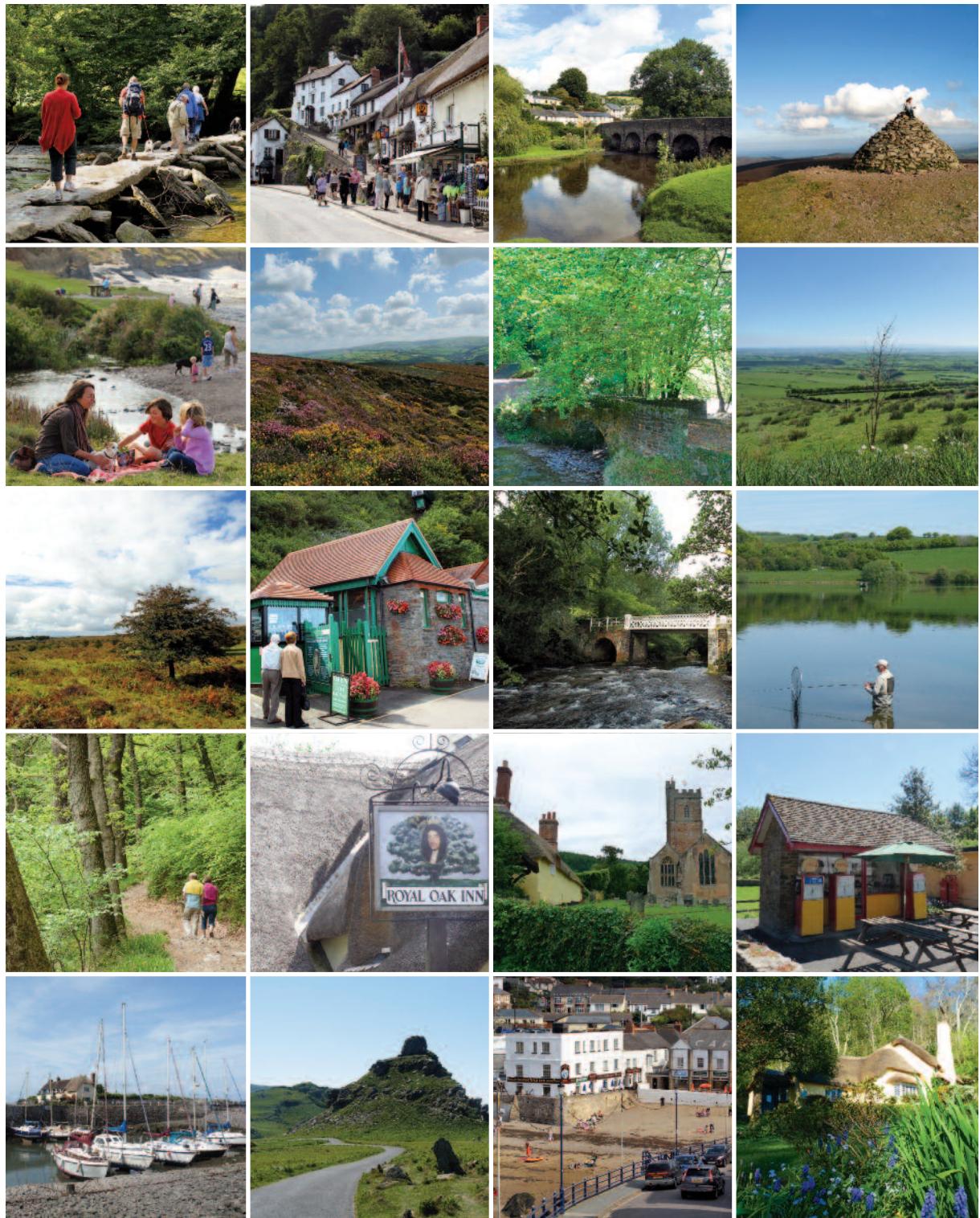


Exmoor National Park

Non-Visitor Survey 2012



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A. Executive Summary

- Survey sites biased towards South West and M4 and M5 corridors to gather information about potential visitors to Exmoor within existing catchment areas
- No definite barriers or reasons why people don't come to Exmoor on holiday: 49% of non-visitors said there was 'no particular reason' why they had not visited Exmoor in the last 5 years
- A proportion of non-visitors holiday in areas near Exmoor but have not visited the National Park: 29% of non-visitors have holidayed the north peninsula of the South West. Many non-visitors are prepared to make the journey to the area but have not been to Exmoor National Park itself
- Awareness of Exmoor as a National Park is high: 85% of non-visitors had heard of Exmoor before filling in the questionnaire. This supports indications from National Opinion Poll (GfK NOP 2007) data of high awareness of Exmoor
- Awareness of what to do on Exmoor appears not be as high; 21% of non-visitors said they 'did not know what is there/ to do'. 'Don't know much about it' and 'don't know what's there' also featured prominently in answers to the question regarding the most unappealing aspects of Exmoor
- The Exmoor tourism product is relevant to non-visitors: 93% of non-visitors said they were interested in taking countryside holidays, 65% had taken a countryside holiday in the last 2 years and 66% had visited a UK National Park in the last five years
- In terms of the activity preference profile, Exmoor's tourism product matches non-visitors preferences in terms of short walks, long walks, visiting towns and villages, visiting attractions, wildlife watching and sightseeing by car/motorbike
- Data supports indications from the Visitor Survey 2010 that there is a 'missing generation' of visitors to Exmoor aged 25-44. 42% of responses to this survey were from this age group: useful for targeting the holiday preferences of this group
- Internet and personal recommendation are key sources of information when planning a holiday. 84% of non visitors use the internet and 51% use personal recommendations.
- Personal recommendations are particularly important for those aged under 45: 20% more non-visitors aged under 45 use personal recommendation than those aged over 45

- Given the proportion of people that use personal recommendations as a source of information when planning a holiday this highlights the need to maintain and develop a quality offer on Exmoor
- Importance of short breaks for non-visitors: 64% said that if they were to visit Exmoor in the next 3 years it would most likely be on a short break. Short breaks in self-catering or camping/caravanning accommodation are particularly popular among non-visitors who have taken 'UK only' holidays in the last two years
- Non-visitors aged under 45 have different activity preferences to those aged over 45. Those under 45 displayed a higher preference for cycling (29% difference), mountain biking (21%), horse riding (17%), swimming (21%), watersports (20%), events/festivals (46%) than those aged over 45
- Images of Minehead beach with North Hill in the background, open moorland and Porlock Vale with ponies in foreground were ranked as the three most appealing images of UK holiday destinations by non-visitors
- Unique selling points of Exmoor ranked as most strongly desirable to non visitors were wildlife, opportunities to relax and unwind and Exmoor's status as a Dark Skies Reserve

B. Context

B1. Background

- B1.1. This survey was conducted on behalf of Exmoor National Park Authority (ENPA) as part of an 8 week business placement by a student from the Centre for Sports, Leisure and Tourism Research at the University of Exeter, funded by the ESRC Capacity Building Clusters Award (RES-187-24-0002). It forms part of a larger body of research directed by ENPA including Visitor and Business surveys, and data on the volume and value of tourism. This non-visitor survey contributes to this data set, which provides an overview of tourism in the National Park.
- B1.2. Unlike previous research into Exmoor tourism, this survey does not capture the responses of visitors on Exmoor or the Exmoor tourism industry. It explores the non-visitor market at locations outside of Exmoor. A precedent for non-visitor survey research has been set by South West Tourism (2009) and Northumberland National Park (2009) among others.

B2. Introduction

- B2.1. The purpose of this survey is to produce data that will improve the marketing of Exmoor to potential visitors. By better understanding the countryside visiting behaviours of non-visitors to Exmoor, the National Park can be marketed in ways that suit the holiday preferences of potential users. As such this work contributes to towards the delivery of the targets of the Exmoor Tourism Partnership, which aims to increase the volume and value of visitors to Exmoor.
- B2.2. Exmoor receives over 2 million ‘visitor days’ per year, and visitor spend provides considerable value to the local economy amounting to almost £90m per annum (STEAM, 2010). In comparison to other National Parks these figures are relatively low (ANPA 2011). Natural England’s *Monitor of Engagement with the Natural Environment* estimates that there are 2.7bn visits per annum to the English countryside (Natural England 2012, 7). In 2009 there were an estimated 165.9 million visitor days to the UK National Parks (STEAM, 2009 – as provided by ANPA 2011).
- B2.3. This survey aims to produce data that can be used to translate some of these millions of visits to the countryside into visits to Exmoor National Park. Through qualitative investigation of Exmoor’s non-visitor markets, the results of this work will allow for an informed orientation of Exmoor’s multiple tourist offers (e.g. coastline, walking, historic towns, and outdoor activities) towards the holiday preferences of potential visitors to Exmoor. In other words, it will shape the way Exmoor is ‘packaged’ as a tourism destination in marketing and promotional campaigns.
- B2.4. This survey explores the awareness and perceptions that potential visitors have of the Exmoor tourism product offer. The survey is focused on ‘non-visitor’ countryside holiday choices and respondents’ knowledge of Exmoor National Park. It considers potential visitors’ preferred countryside activities, information sources and responses to different sorts of images of countryside and rural locations. It is known that awareness of Exmoor National Park is relatively high (GfK NOP 2007) in comparison to other National Parks, however, as highlighted above visitor levels are relatively low. By exploring potential visitor awareness of the Exmoor tourism product and their

associations with the Exmoor area, the results of this survey can be used to overcome some of the perceptual and informational barriers that block visits to Exmoor.

- B2.5. In hard economic times the activation of Exmoor's non-visitor markets is important in building a resilient and sustainable tourism industry. This survey has been designed to explore the perceptions and tourism practices of non-visitors to Exmoor with the intention of ensuring marketing messages are aimed at the right audiences in the way most likely to attract new visitors.

C. Methodology

C1. General information

- C1.1. A total of 280 questionnaires were completed by respondents at various countryside sites from 29th March to 23rd April 2012. Survey sites were selected along the Motorway 4 and Motorway 5 'corridors', representing the main catchment areas for Exmoor National Park.
- C1.2. The questions asked in the survey and tabulated data results can be found in Appendix 1.
- C1.3. A combination of paper and digital surveys was conducted. The visual format in Appendix 1 differs from the presentation shown to respondents, although the wording and order of the questions and options of answers remain the same.

C2. Survey sites

- C2.1. All survey sites were situated in Southern England with a bias towards the South West (see table and figure 1). This survey aimed to understand non-visitors within existing catchment areas for Exmoor. Since Exmoor is one of the least visited national parks (GfK NOP 2007), the bias towards the South West intended to capture proximate non-visitors markets, to whom Exmoor is relatively accessible and who might be reasonably expected to be attracted to the offer of Exmoor.
- C2.2. Most surveys were conducted at countryside sites and green spaces (see table 1) based upon the hypothesis that people visiting such sites have already displayed a propensity to visit the countryside and are therefore likely to find the Exmoor tourism product appealing.
- C2.3. Some surveys were conducted at heritage tourism sites such as Marlborough, Oxford, Glastonbury were also included to capture non-visitor markets that may find Exmoor's historic environment (e.g. Medieval Dunster, West Somerset Railway, Tarr Steps) appealing.
- C2.4. Respondents were asked to give the first half of their post code. When grouped regionally, 60% of respondents came from the South West (see table 2).

Table 1. Survey site locations

Location	Total Survey Results	Percentage
Durdham Downs, Bristol	31	11%
Ashton Court	27	10%
Mendip Hills	14	5%
Cirencester	10	4%
Cheddar Gorge	34	12%
Glastonbury Tor	57	20%
Oxford	39	14%
St Andrews Park, Bristol	30	11%
Marlborough	7	3%
Stroud	14	5%
London	17	6%
Total	280	100%

Figure 1. Sample locations of respondents (Map © Exmoor National Park Authority)

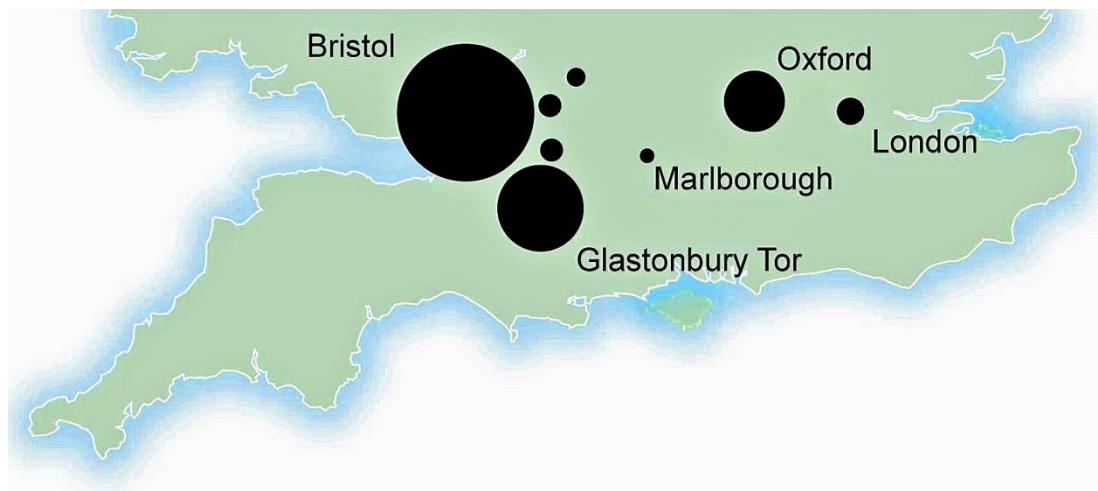


Table 2. Home location of all respondents

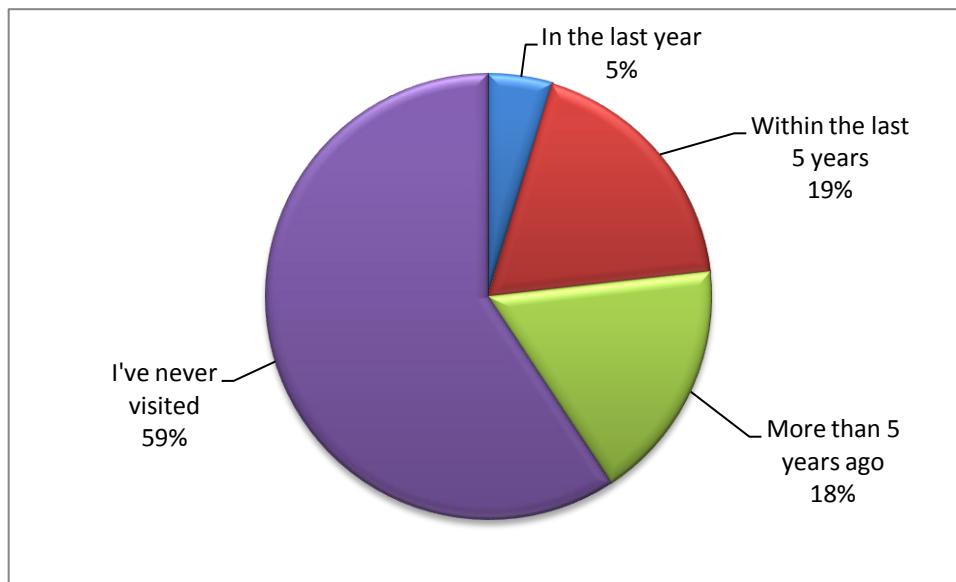
Region	Percentage
South West	60%
South East	15%
London	11%
East Midlands	3%
Overseas	3%
West Midlands	2%
North West	2%
Yorkshire/ Humber	1%
Scotland	1%
Wales	<1%
North East	<1%
East of England	<1%

D. Results

D1. Definition of a non-visitor

- D1.1. We define a non-visitor to Exmoor as someone who has never visited Exmoor or someone who has not visited Exmoor in the last five years. Of all respondents to the survey 59% had never visited and 18% had visited more than 5 years ago (see figure 2). This means 77% of responses were counted as non-visitors.

Figure 2. Defining the non-visitor: When was your most recent visit to Exmoor?

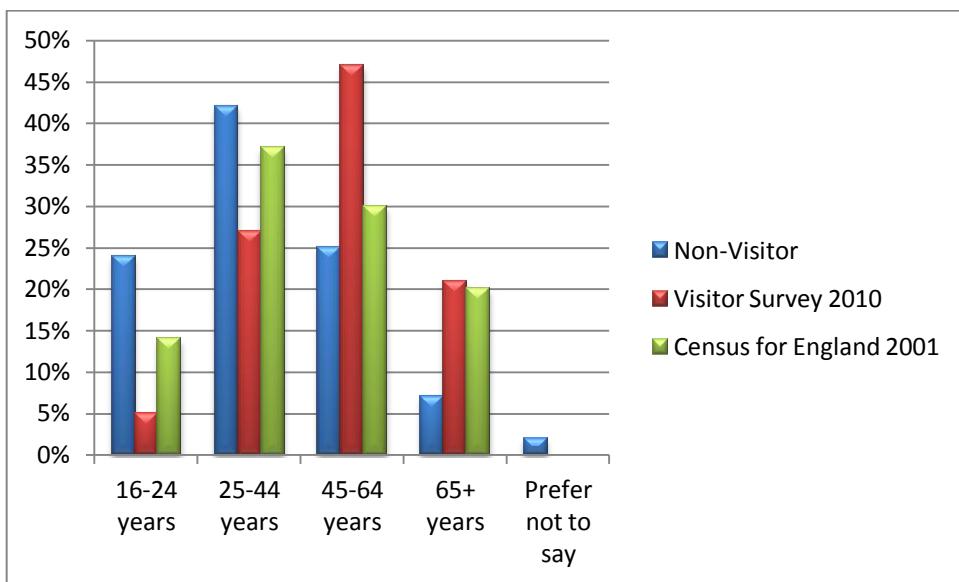


D2. Respondent profile

- D2.1. Of a total of 280 responses, the gender profile was fairly evenly split between males (52%) and females (47%) with 1% preferring not to say.
- D2.2. In terms of age profile, it should be noted that 42% of respondents were aged 25-44; 66% of respondents were under 45 (see figure 3). This age profile is more heavily biased towards a relatively younger profile compared to current visitors to the area, as represented in the 2010 Exmoor visitor Survey in which 68% of respondents were over 45 (see figure 3). Whilst unintentional, this bias makes the results more relevant to meet the desired aims of partners promoting Exmoor to a younger audience.
- D2.3. Comparisons with the census data (see figure 3) suggest that the 16-24 age group is over represented in this survey and that the 65+ age group is under represented. Representation of 25-44 and 45-64 is relatively close to the national average. It should be noted that the age profile of populations are not evenly spread across the country and that the locations of survey sites will have their own distribution of age groups.
- D2.4. 7% of all respondents to the non-visitor survey defined themselves as belonging to an ethnic minority (as compared to 7.9% of the total population in the 2001 Census). 2% said they had long standing health issues or a disability which is significantly lower than the UK average of 18% based upon definitions in the equality act (Office for Disability Issues, 2008). However this difference may be explained by both the nature of the survey sites (predominantly countryside areas) which may have precluded some

people with disabilities to be present, as well as respondents' own definitions as to whether or not they have a long standing health issue or disability.

Figure 3. Age groups of respondents to non-visitor, Visitor Survey 2010 and Census 2001



D3. Recent holiday behaviour

D3.1. Previous visits to the area

D3.1.1. According to this survey 66% of non-visitors to Exmoor have taken a holiday in the South West in the last 5 years (see figure 4). This is likely to reflect both the locations of survey sites and popularity of the South West as England's most visited domestic holiday destination (Great Britain Tourism survey 2011, Visit England).

D3.1.2. Given the popularity of the South West as a tourism destination, it should be noted that this survey suggests that 71% of non-visitors (see figure 5) to Exmoor had not visited the South West northern peninsula, incorporating the districts of Torridge, Exmoor, Taunton Deane and parts of West Somerset and North Devon regions (see figure 5). That 29% of non-visitors to Exmoor had visited the South West northern peninsula might be expected given that Exmoor National Park took up about one third of the map displayed (see figure 5), and is surrounded by other popular tourist destinations such as North Devon coastal resorts. However it indicates that a considerable proportion of non-visitors take holidays near Exmoor, but not within the National Park.

Figure 4. Percentage of non-visitors who had holidayed in the South West and map displayed in survey

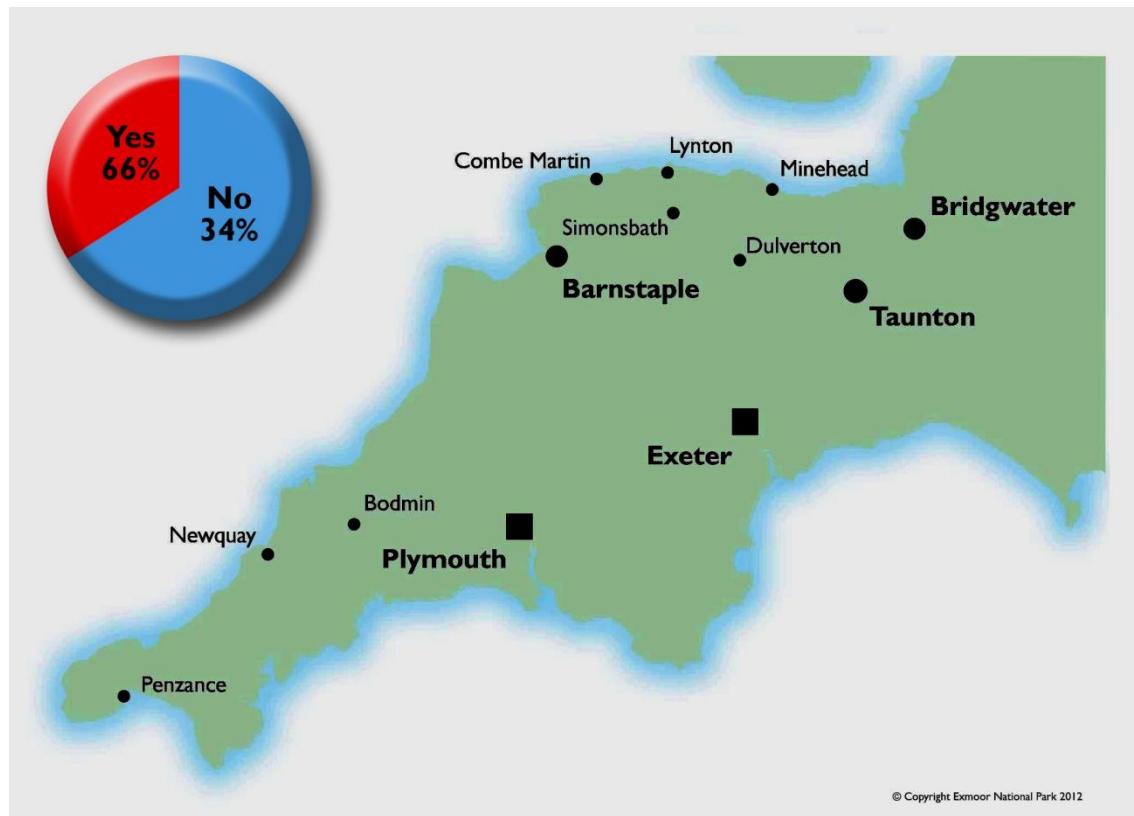
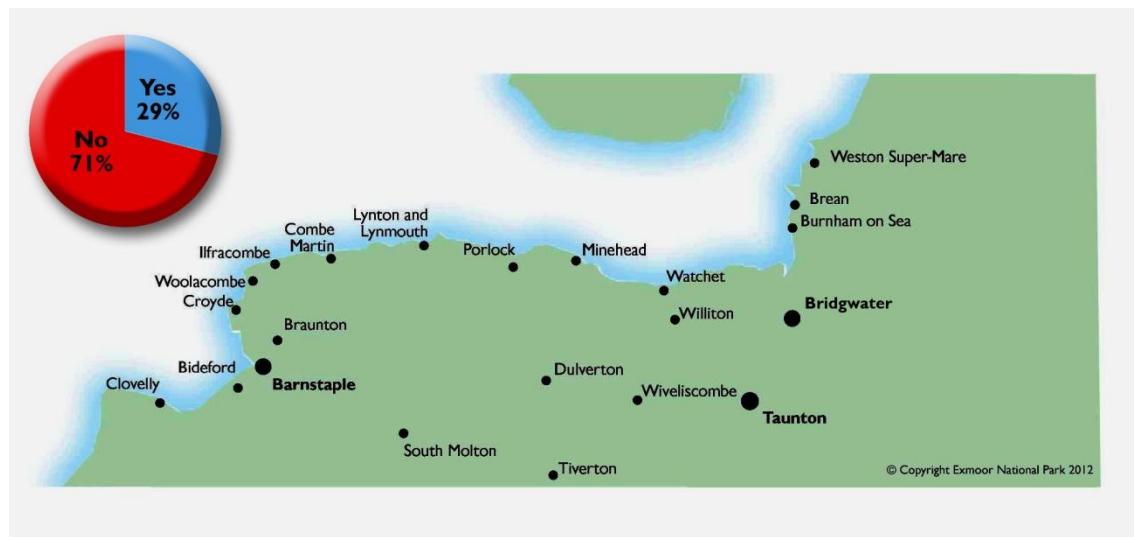


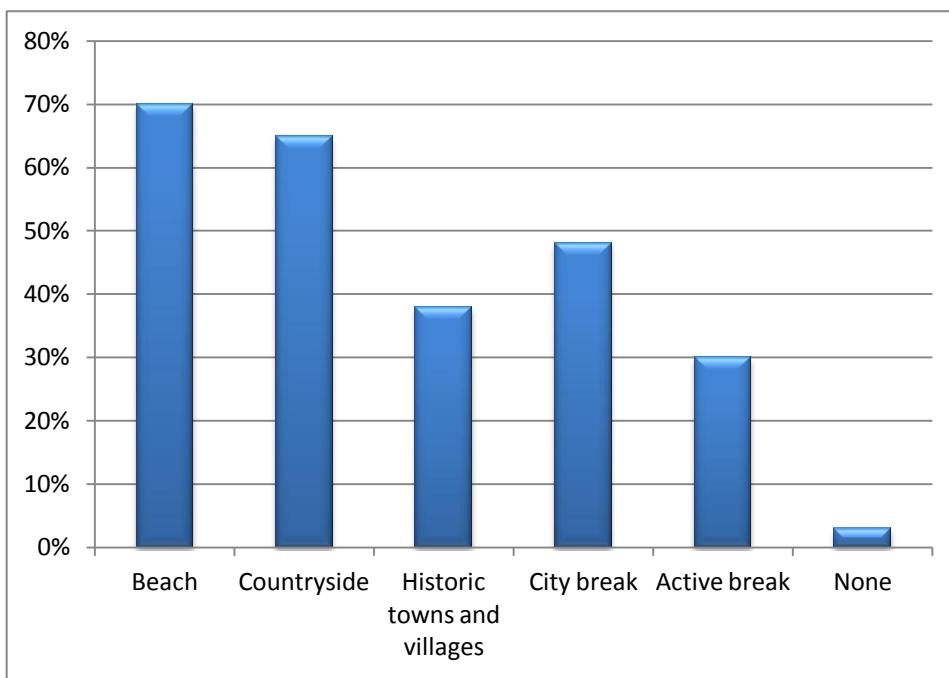
Figure 5. Percentage of non-visitors who had holidayed in the South West northern peninsula and map displayed in survey



D3.2. Holiday type

- D3.2.1. Most non-visitor respondents had taken a holiday at the beach (70%) or in the countryside (65%) in the last two years (see figure 6). With its combination of coast and countryside Exmoor's tourist product would appear to be relevant to the holiday behaviours of non-visitors. 84% of these holidays were taken in the UK and 71% overseas. Higher proportions of holidays taken in the UK rather than abroad may be a result of the 'Staycation'.

Figure 6. In the last 2 years what sorts of holidays have you been on? Non-visitor results.



D3.3. Accommodation type

- D3.3.1. Self catering (55%) is the most popular accommodation choice on the basis of non-visitors holidays in the last 2 years (see figure 7). This is followed by serviced accommodation (43%) and camping/caravanning (37%). The popularity of camping and caravanning may reflect savings necessitated by the current economic climate. Package holidays were taken by 17% of non-visitors.
- D3.3.2. When we compare non-visitors who have only taken overseas holidays in the last 2 years and those who have only taken UK holidays a slightly different pattern emerges in terms of accommodation preference (see figure 7). Package deals and hotels are more common among non-visitors who have only holidayed overseas in the last two years. UK only holidaymakers are more likely to have camped/caravanned or used self-catering accommodation.

D3.4. Length of recent holidays

- D3.4.1. Weeklong holidays are the most common length of stay with 73% of non-visitors taking a holiday of this period in the last two years (see figure 8). 52% took short breaks and 38% holidayed of 2 weeks or over. Comparison with overseas only holiday and UK only holidays among non-visitor respondents, suggest that holidays of 2 weeks and over more common in overseas holiday. Week long holidays are fairly common in both cases (38% of UK only, 55% of overseas only holidays). Short breaks are predominantly a feature of UK only holidays, with 71% of UK only holidaymakers taking a short break. This fits with national trends towards short breaks for domestic holidays.

Figure 7. Types of non-visitor holidays filtered for only overseas and only UK

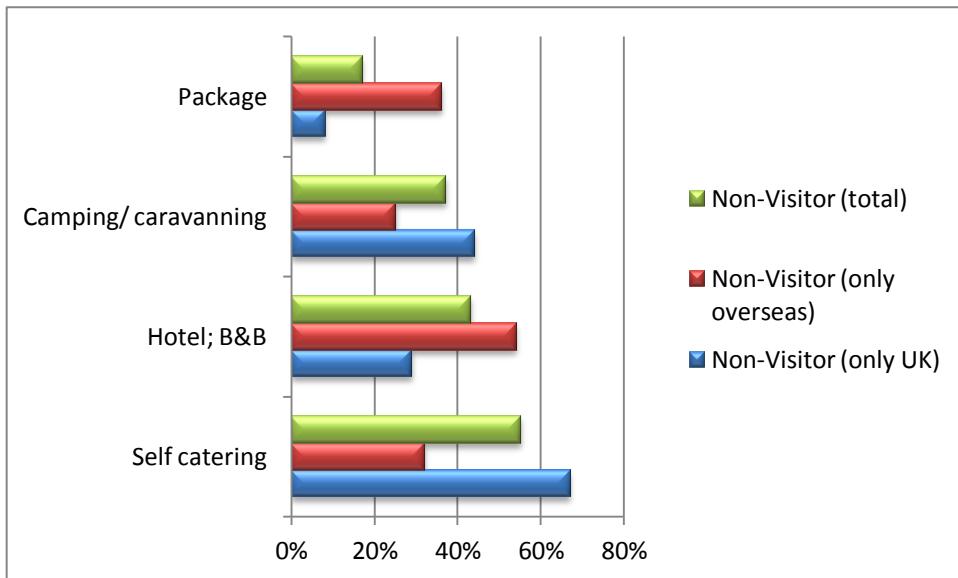
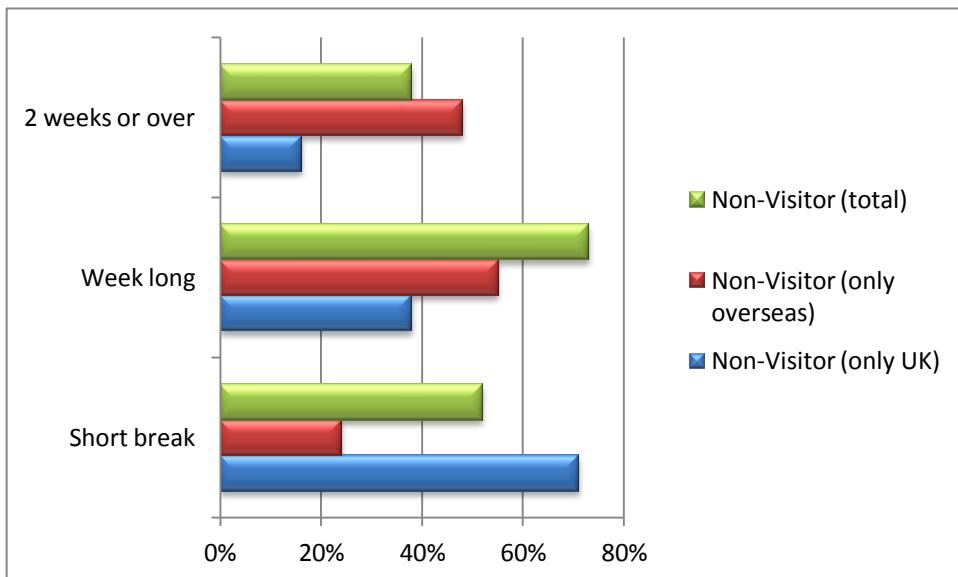


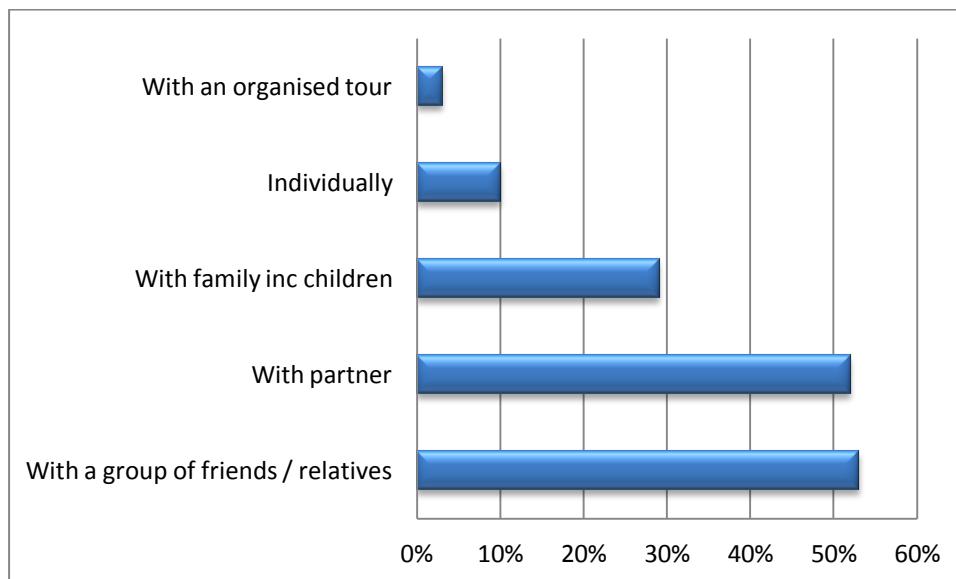
Figure 8. Comparing UK only and Overseas only: lengths of non-visitor holidays in last two years



D3.5. Holiday troupe

D3.5.1. Non-visitors to Exmoor tend to holiday with a group of friends or relatives (58%), partner (52%) or family with children (29%). Only 10% say they holiday individually and 3% on an organised tour (see figure 9).

Figure 9. Who do you usually holiday with? Non-visitor results



D4. Recent holiday behaviour

D4.1. National Park visits

D4.1.1. In this survey Exmoor ranked 6th in terms of National Parks holidayed within in the last 5 years (see figure 10), however fewer respondents reported visiting Exmoor than other national parks within a similar distance to the survey sites such as the Brecon Beacons, Dartmoor and the New Forest.

D4.1.2. These are the three National Parks closest to Exmoor; of non-visitors to Exmoor, 36% have visited these three National Parks and 12% have visited Dartmoor, Exmoor's closest sibling in the National Park's family. Encouragingly 66% of non-visitors to Exmoor have taken a holiday in a UK National Park in the last 5 years (see table 3).

D4.1.3. The South West bias of this survey is likely to have inflated visitor levels within or close to the region in comparison to more distant National Parks.

D4.1.4. 34% of non-visitors to Exmoor had not visited any national parks in the last five years. Across the whole sample slightly fewer people (27%) had not visited any national park (see figure 11). Whilst this may suggest that non-visitors have lower interest in visiting National Parks this is not a particularly statistically significant difference and the suggestion must be balanced with indications that 64% of people who have never visited Exmoor, have visited another National Park in the last 5 years, demonstrating that there is a market for National Park products like Exmoor.

Figure 10. National Parks visited in the last 5 years

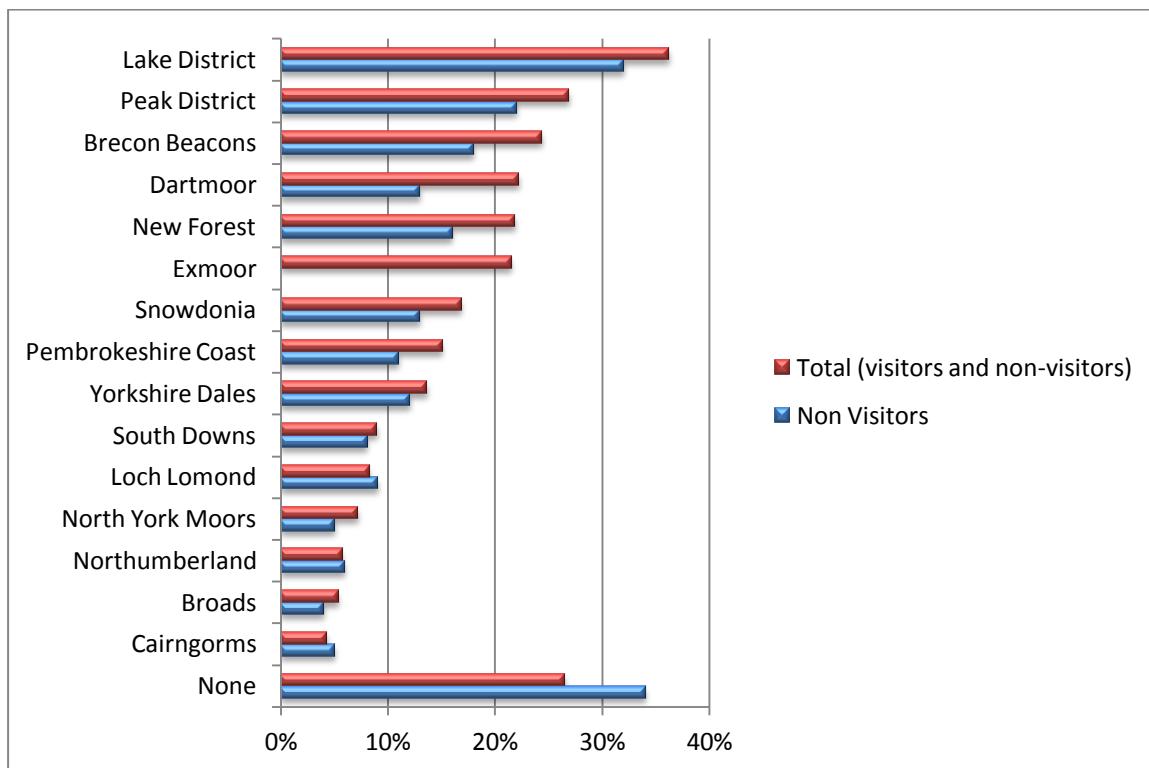
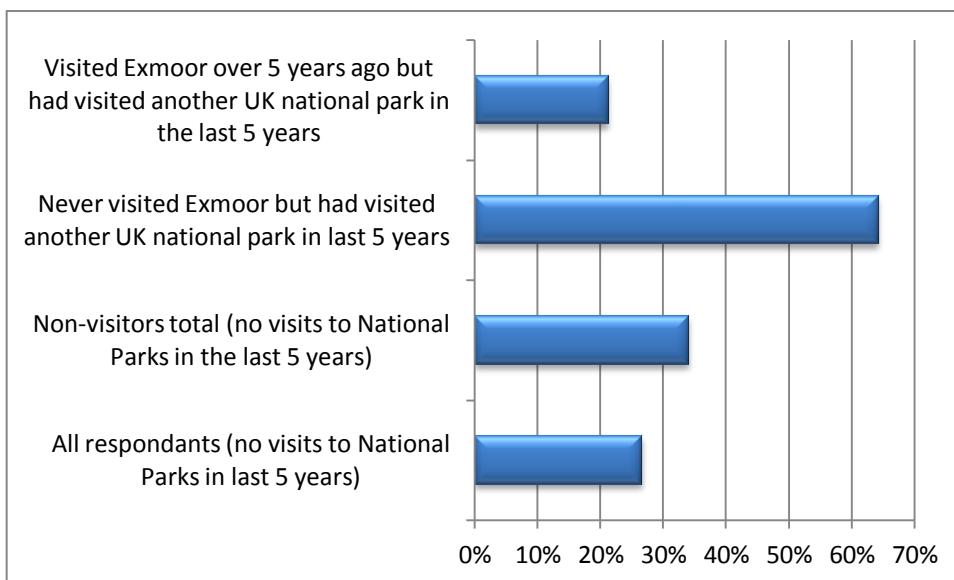


Table 3. Non-visitors who have taken or not taken holiday in various National Parks

Non-visitors to Exmoor who in the last 5 years have taken...	%
no holidays in any UK National Parks	34%
a holiday in any UK National Park	66%
a holiday in Brecon Beacons, Dartmoor and/or New Forest National Parks	36%
a holiday in Dartmoor National Park	13%

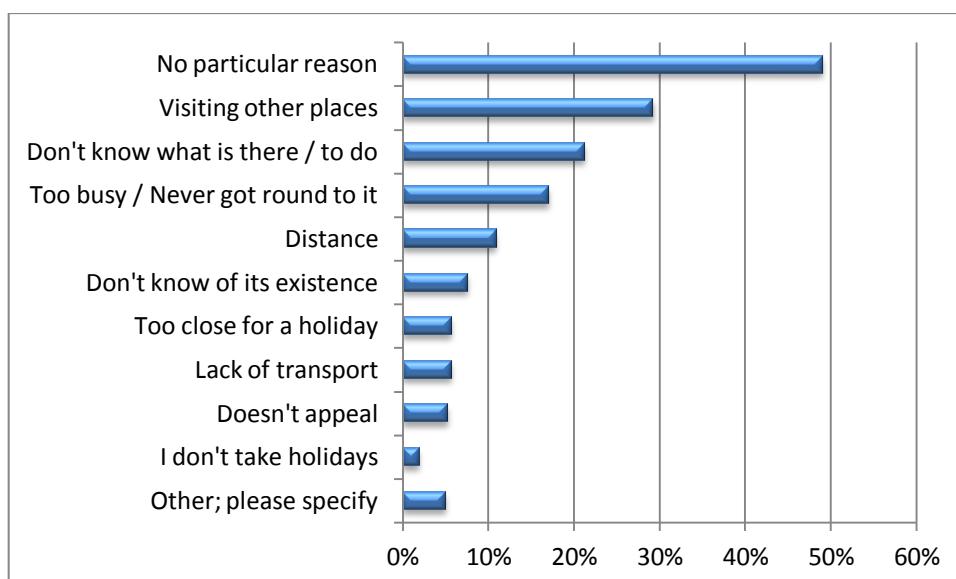
Figure 11. Non-visitors to Exmoor and visits to other National Parks



D4.2. Reasons for non-visits

D4.2.1. When we asked non-visitors if they had any particular reason for not holidaying on Exmoor in the last 5 years 49% said they had no particular reason and 29% said they were visiting other places (see figure 12). That 21% said they 'did not know what is there/ to do' signals that increasing information and marketing for Exmoor might increase visitor numbers to Exmoor. When asked what, if anything was unappealing about Exmoor as a visitor destination one of the most significant responses was that they did not know what there is to do, suggesting that a lack of information can actually detract from the image of an area as a tourism destination. Although 11% signalled that distance was a reason for not visiting, one of the most appealing features of Exmoor as UK holiday destination was that it was 'close'. These results again are likely to have been influenced by the chosen survey sites within relative proximity to Exmoor.

Figure 12. Do you have any particular reason for not holidaying on Exmoor in the last 5 years? Non-visitor results

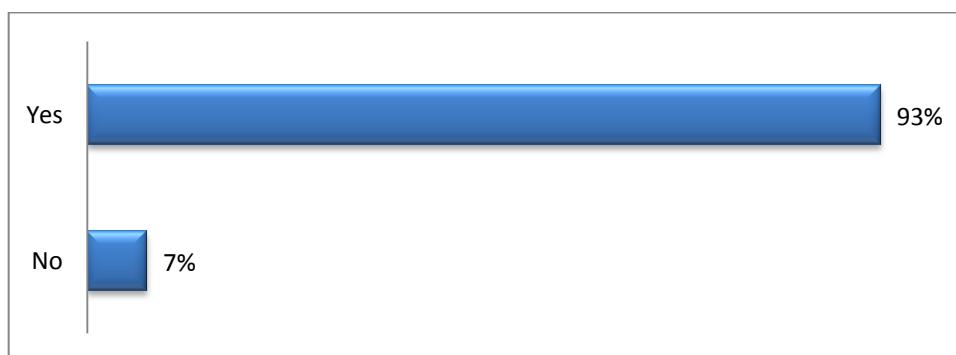


D5. Holiday preferences and decision making

D5.1. Interest in countryside holidays

D5.1.1. Only 7% of non-visitors to Exmoor say that they are not interested in visiting the countryside on holiday (see figure 13). With 97% expressing an interest in countryside holidays in general terms, Exmoor is a place that most people might visit for a holiday.

Figure 13. Percentage of non-visitors interested in visiting the countryside on holiday



D5.2. Activity preferences of non-visitors

- D5.2.1. In terms of activities, the tourist practices of visitors and non-visitor to Exmoor are comparable in a number of areas (see figure 14). Comparison with the Exmoor Visitor Survey 2010 indicates that similar proportions of non-visitors and visitors take short walks, long walks, visit towns and villages, visit attractions, sightsee by car/motorbike and watch wildlife. This suggests that large parts of the Exmoor tourism product meet the activity preferences of the non-visitor market.
- D5.2.2. It should be noted that this comparison is between activities that non-visitors *expect* to undertake ('what activities would you be *likely to undertake* on a countryside holiday?') and activities *actually undertaken* by Exmoor visitors ('what activities have you *undertaken* during your stay in the area?').
- D5.2.3. Higher proportions of non-visitors said that they would undertake cycling (43%), events/festivals (43%), swimming (32%), watersports (19%) and horse riding (12%) on a holiday, than visitors actually undertook while on holiday on Exmoor. Of course, there is often a gap between intention to undertake an activity and actually doing it. Nevertheless in terms of what sorts of holiday experience appeal to non-visitors, the survey data suggest that cycling, swimming and events/festivals are important potential activities and opportunities on Exmoor should be actively promoted.
- D5.2.4. Although there are possibly differences between the preferred holiday activities of visitors and non-visitors this might suggest that people intend to undertake certain activities on a countryside holiday but on Exmoor, their intentions are not fulfilled. Given Exmoor's tourism offer in terms of cycling, watersports (e.g. at Wimbleball and along the coast), mountain biking, events/festivals and horse riding, indications that non-visitors like to undertake these activities could inform local publicity. Increasing awareness of these activities might enhance the visitor experience of Exmoor. National publicity e.g. of events/festivals, might provide non-visitors with an appealing reason to visit Exmoor.
- D5.2.5. It is known that visitor satisfaction with Exmoor is high; 99% of respondents to the Exmoor Visitor Survey (2010) rated their overall satisfaction with their visit to Exmoor as Good or Very Good. 80% of visitors to Exmoor are repeat visitors (State of Tourism Report 2010). Data from the non-visitor survey does not explain whether opportunities for activities actually motivate holidays, but it does suggest that certain activities appeal to non-visitors and hence might be valuable in wider marketing campaigns.
- D5.2.6. By segmenting information about activities according to age, a more nuanced picture emerges (see figure 15). Notable differences between the activity preferences of the two age groups exist in terms of cycling (29% difference), mountain biking (21%), horse riding (17%), swimming (21%), watersports (20%), events/festivals (46%).
- D5.2.7. Although by no means an exact match, the activity profile of those over 45 is closer to that of the Exmoor Visitor Survey than the activity preferences of those under 45. Long walks, mountain biking, horse riding, running, events and festivals and sightseeing by car have relatively similar response levels. This similarity in activity preferences between non visitors aged over 45 and current visitors is likely to reflect the age

profile of respondents to the Exmoor Visitor Survey, which were skewed towards those over 45. Given the lower representation of those under 45 in the Exmoor Visitor Survey, this survey highlights how the activity preferences of non-visitors appear to differ from the current visitor market.

Figure 14. Activities non-visitors would be likely to undertake on a countryside holiday and activities undertaken by visitors to Exmoor

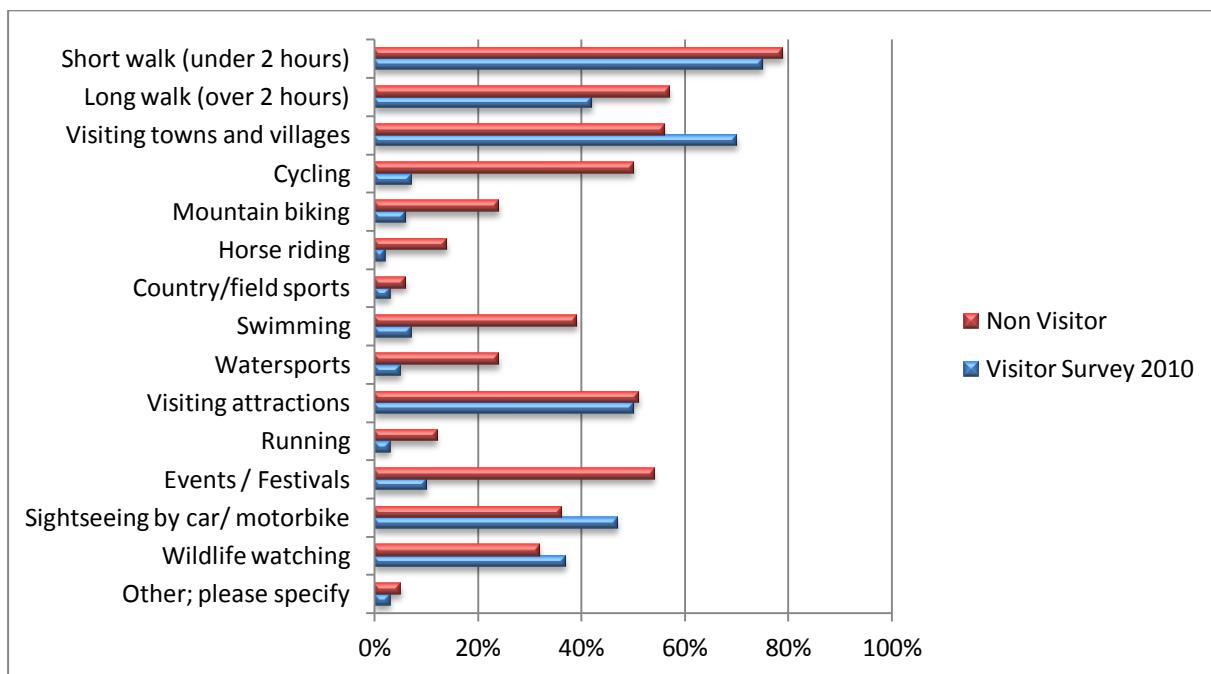
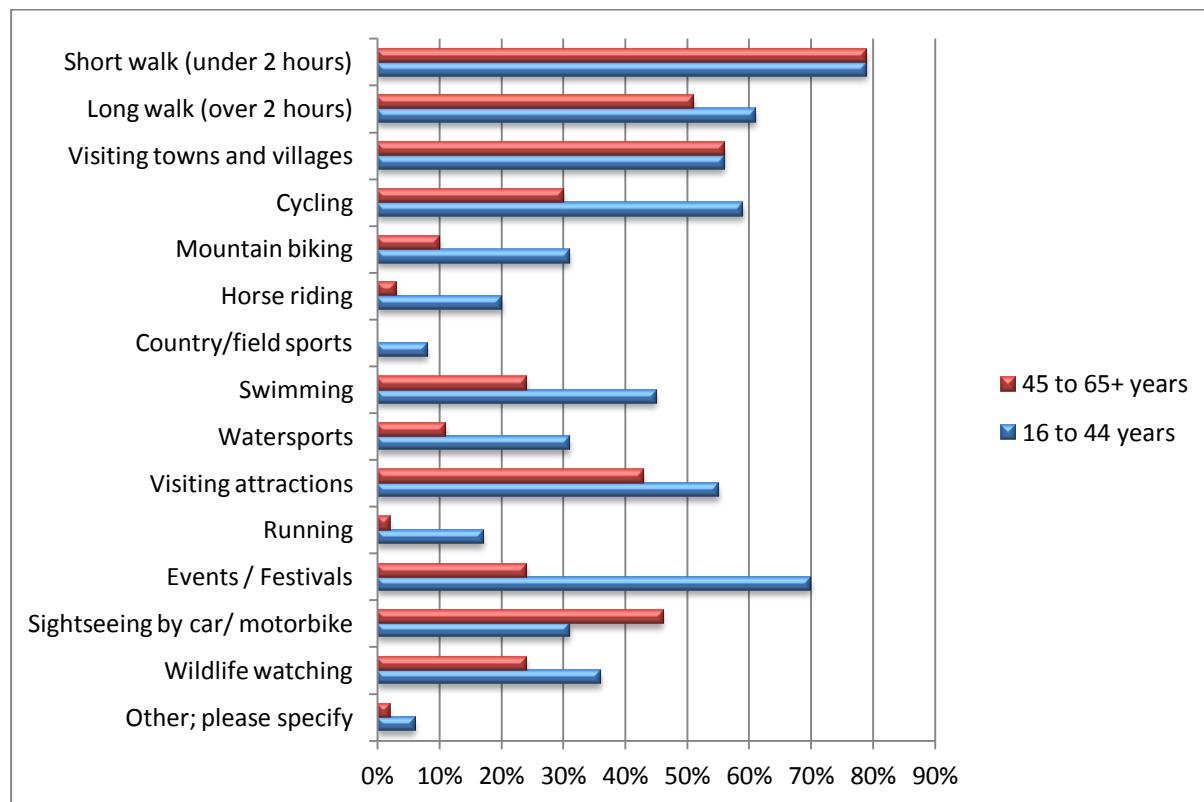


Figure 15. Non-visitor activity preferences by age group



D5.3. Information Sources

- D5.3.1. The internet is used by 86% of non-visitors to find information about a holiday, higher than both first time visitors to Exmoor (69%) and repeat visitors (46%) (see figure 16). Non-visitors used printed brochure/guides/maps (24%) more than visitors (13%). Use of newspaper/magazine as a source of holiday information was also higher among non-visitors (12%) when compared to visitors (6%). Non-visitors to Exmoor seem to rely on textual materials for information about holidays more than visitors, although non-visitors also use personal recommendations (51%) more than visitors (35%). Visitors' to Exmoor emphasis on 'previous visits' (53%) as an information source reflect the high number of repeat visitors to Exmoor.
- D5.3.2. These data can be interpreted as suggesting that the internet is an important location for information and marketing for Exmoor. Applying filters to these data highlights that 42% of non-visitors use both the internet and personal recommendations to obtain information about a holiday.
- D5.3.3. The common use of personal recommendations (51% of all non-visitors) and its connection to use of the internet suggests that marketing that equips current visitors to disseminate information about Exmoor may be effective at recruiting new visitors to Exmoor.
- D5.3.4. By segmenting sources of information used by non-visitors by age (see figure 17), the emphasis placed on personal recommendation by those under 45 features prominently. 20% more non-visitors aged under 45 use personal recommendations than those over 45. However, 23% more non-visitors aged over 45 use printed brochures/guides/maps than those under 45. This raises the interesting question of how to 'advertise' Exmoor through personal recommendation. In terms of marketing

Exmoor to those aged under 45 this channel could be very persuasive if it can be harnessed. It could be suggested that by educating current visitors about what is special about Exmoor is vital to encouraging new visitors to Exmoor because if current visitors do not leave Exmoor thinking that it is unique and special what will they tell their friends/relatives. Social media might prove an important channel for personal recommendation to be transmitted directly or indirectly e.g. via photos. Personal recommendation is a cost effective marketing method, if it can be harnessed. Another option is to seek the use of celebrity endorsement as a quasi-personal recommendation which could be powerful within social media.

- D5.3.5. The emphasis on personal recommendation also reinforces the work of partners to maintain quality within the Exmoor tourism offer. In defining this it is important to go beyond official accreditations and the physical offer of the area but to consider all areas of the visitor experience to include issues such as availability of facilities and services, warmth of welcome etc.

Figure 16. Sources of information used prior to a holiday by non-visitors and current visitors

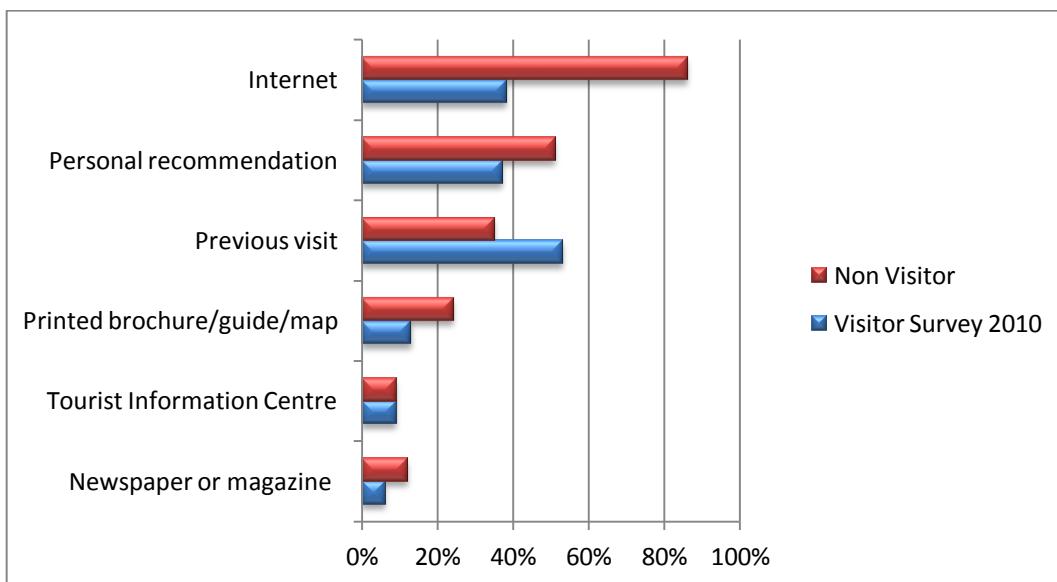
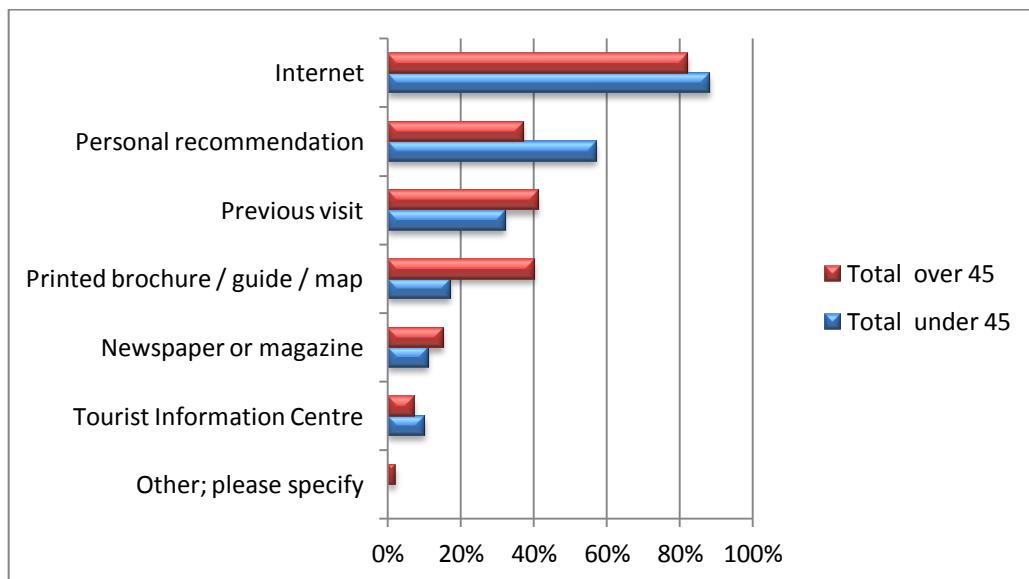


Figure 17. Sources of information used prior to a holiday by non-visitors segmented by age



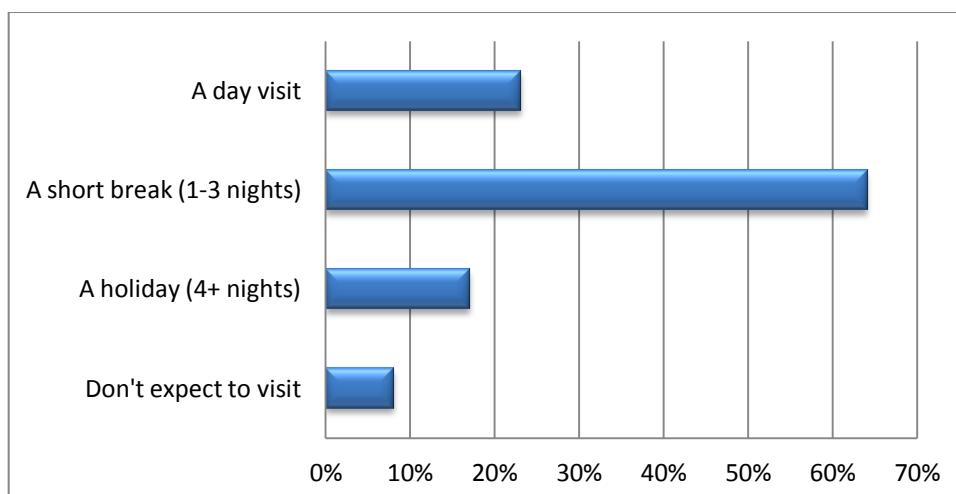
D5.4. Future breaks on Exmoor

D5.4.1. Encouragingly, only 7% of people said that they did not expect to visit Exmoor in the next 3 years (see figure 18), although again it is perhaps unlikely that each of these trips are likely to happen. 64% said that they would be most likely to take a short break on Exmoor. This fits with the 71% of non-visitors who only took UK holiday(s) in the last two years and who took a short break (see figure 8). It also correlates with broad trends for UK holidays towards short breaks. In terms of ‘packaging’ Exmoor, the Exmoor tourism offer for stays of 2-3 days should be considered primary in marketing to non-visitors.

D5.4.2. That 23% of non-visitors (see figure 18) said they were most likely to take a day visit on Exmoor probably reflects the survey site locations; most within about 2-3 hours of Exmoor. It seems reasonable to suggest that some people would want to visit somewhere for a day before deciding to holiday there. The importance of a good tourist product for day visitors might convert some of these potential users into staying visitors.

D5.4.3. 17% said that they would be most likely to take a holiday (4+ days) on Exmoor (see figure 18), however of these 39% (i.e. 14 out of 36 responses that said they would be most likely to take a holiday on Exmoor) also said they might take a short break. Over a third of those who would be likely to take a holiday can be targeted through short breaks advertising. While the holiday market should not be ignored, Exmoor’s offer in terms of short breaks should be priority in terms of non-visitor advertising.

Figure 18. If you are to visit Exmoor in the next 3 years is your visit most likely to be...? Non-visitor results

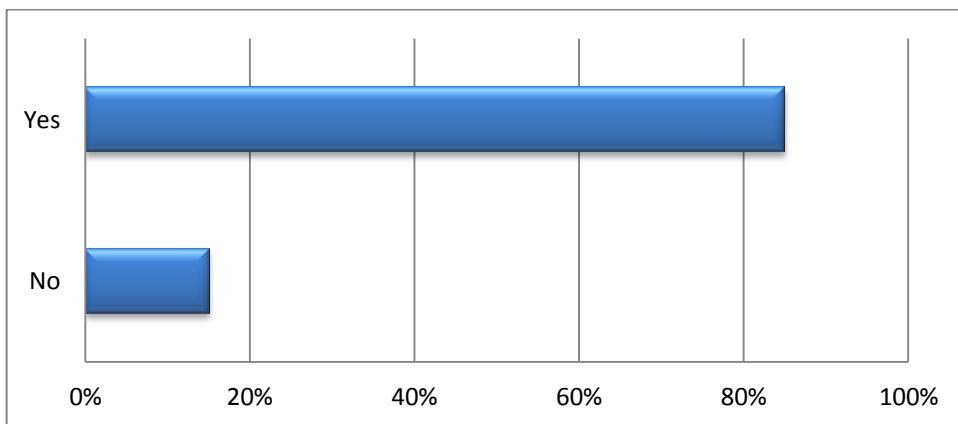


D6. Perceptions of Exmoor and implications for marketing messages

D6.1. Awareness

D6.1.1. 85% of non-visitors to Exmoor had heard of it (see figure 19). This high awareness of Exmoor correlates with previous research into awareness of Exmoor in national opinion polls (GfK NOP 2007). Although 15% had not heard of Exmoor, of these 42% (15 of 32 responses) had not visited any National Park in the last 5 years. Those who had heard of Exmoor may not know much about National Parks or take holidays elsewhere.

Figure 19. Had you heard of Exmoor before today? Non-visitor results



D6.2. Appealing and unappealing aspects of Exmoor

D6.2.1. The wordles below have been created using comments that people made about what appeals and what does not appeal to them about holidaying on Exmoor. The wordles includes comments made by all respondents, not just non-visitors. Overall the response rate for these questions were not particularly high with 51% answer 'what appeals?' and only 31% of respondents answering 'what doesn't appeal about Exmoor?' (see table 4).

D6.2.2. These comments were edited and themed to make the wordle more useful e.g. 'ponies' and 'horses' grouped under 'ponies'; 'open spaces' grouped with 'space'; 'proximity' grouped with 'close'. For a list of original comments see Appendix 1.

Table 4. Percentages of all respondents who answered questions about appealing and unappealing features of Exmoor

	What appeals?	What doesn't appeal?
Answered by non-visitors	44%	32%
Answered by visitors	75%	28%
Answered total	51%	31%

D6.2. 'What appeals?'

D6.2.1. 'Countryside' is the most popular appealing feature of Exmoor according to the wordle (see figure 20), but it should be noted that this word was used repeatedly in the questionnaire so its dominance might be overstated. This said, generic features of countryside such as 'scenery', 'beauty', 'wildlife', and 'quiet' seem to support the notion that 'countryside' is an important association with Exmoor. Interestingly 'close' was an important appealing features, particularly give Exmoor's reputation for remoteness, however this may reflect the location of survey sites. Aspects of Exmoor that are special to Exmoor such as 'ponies', 'coast', 'beast', do appear, but these are less popular than more general associations of countryside. However these will be essential components to promote Exmoor as a unique destination over and above competitors.

D6.2.2. This wordle includes comments made by all respondents, not just non-visitors. This question was answered by 44% of non-visitors and 75% of visitors.

Figure 20. What appeals about Exmoor in comparison to other UK holiday destinations (created on Wordle.net)



D6.3. ‘What doesn’t appeal?’

- D6.3.1. When asked what, if anything, was unappealing about Exmoor in comparison to other destinations many people said that they 'did not know what there was to do' on Exmoor or that they 'didn't know what is there' (see figure 21). Concerns about 'weather' are beyond marketers control; although there are ways of ensuring all weather options are included in marketing campaigns. However perceptions of 'distance', 'isolation' and 'transport' could be a distinct focus in future campaigns. Given that people say that Exmoor being 'close' appeals to them, it is possible that although people know it is close, they do not know exactly how to get there, particularly on public transport.

D6.3.2. 10 respondents stated that 'nothing' doesn't appeal, i.e. there are no unappealing features of Exmoor for these respondents. This response was not included in the wordle to make it more legible and relevant.

Figure 21. What does not appeal about Exmoor in comparison to other UK holiday destinations (created on Wordle.net)



D6.4. Images of Exmoor

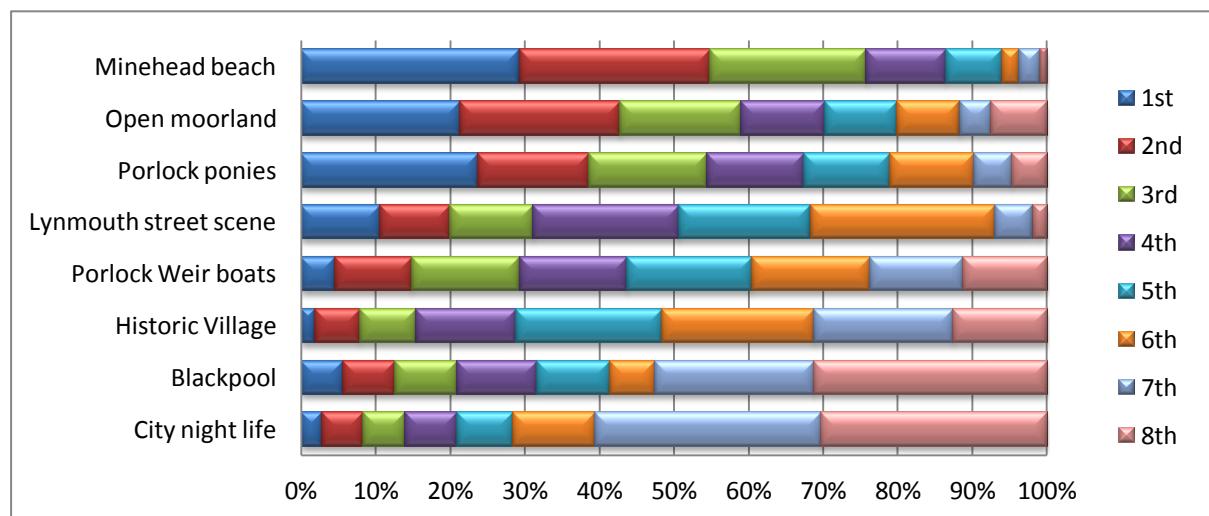
- D6.4.1. Respondents were shown 8 images (see figure 22) of different types of holiday destination and asked to rank them in terms of their appeal. 6 of the 8 images were taken within or around the National Park, but this was not disclosed to participants.

Figure 22. Images used in questionnaire
 (top row, left to right: Minehead beach, Porlock Ponies, Open moorland, Historic Village
 bottom row, left to right: Porlock Weir boats, Lynmouth street scene, Blackpool, City night life)



D6.4.2. In terms of which images are appealing to non-visitors it is encouraging that images of Minehead beach against a backdrop of Exmoor, open moorland and Porlock Vale with ponies were ranked most highly (see figure 23). In advertising to non-visitors use of similar images might be effective in attracting people to the area. Images of a Lynmouth street scene, boats at Porlock Weir and a view of an historic village were less popular – although it should be noted that, in the case of Lynmouth for example, this was also the 2nd least unappealing image of all shown. Images of Blackpool and city night life were most unpopular even though 48% of non-visitors had taken a ‘city break’ in the last two years.

Figure 23. Ranking images of Exmoor as a tourism destination; non-visitor results



D6.5. Desirability of Exmoor unique selling points

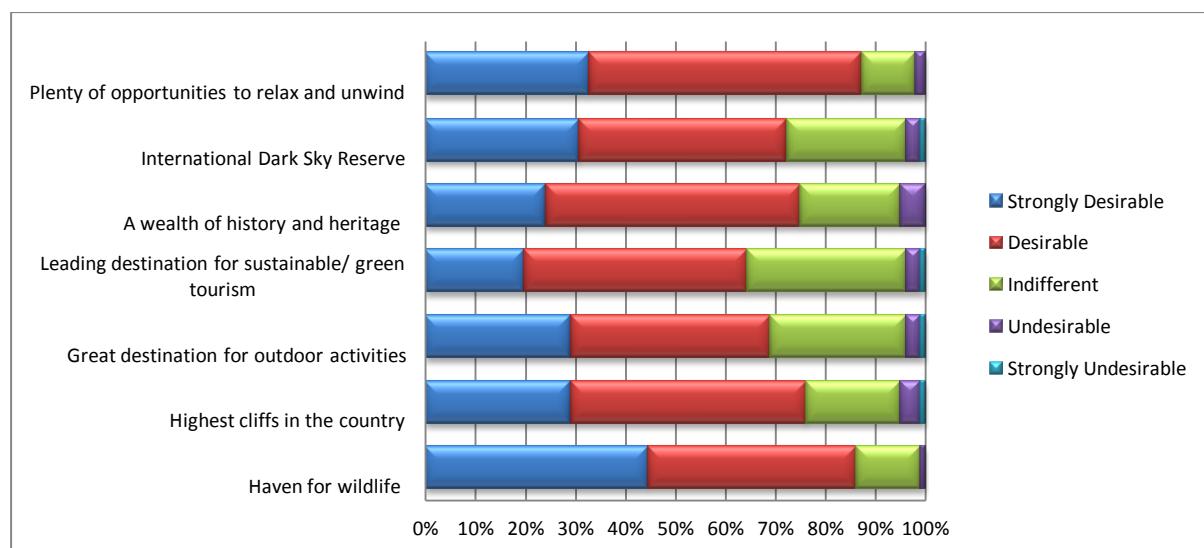
D6.5.1. Respondents were asked to rank statements about Exmoor in terms of how desirable they found them as aspects of a holiday destination. These statements comprised of Exmoor’s unique selling points. The non-visitor response was largely positive, with

rankings of undesirable and strongly undesirable only making up less than 5% of rankings to any one question (see figure 24).

D6.5.2. In terms of which aspects of the Exmoor tourism product are most strongly desirable to non-visitors, haven for wildlife (45%), opportunities to relax and unwind (33%) and Dark Skies Reserve (31%) ranked highest. When we combine rankings of strongly desirable and desirable, the top three are opportunities to relax and unwind (88%), haven for wildlife (87%) and highest cliffs (76%) (see figure 24).

D6.5.3. Given that National Parks are well known for their opportunities for outdoor activities it is interesting that 27% of non-visitors are indifferent to Exmoor's offer for outdoor activities, although 69% found this strongly/desirable. Exmoor is one of the leaders in sustainable or green tourism, however 32% of non-visitors were indifferent to this selling point of Exmoor, even so, 65% of non-visitors said that this was strongly/desirable quality.

Figure 24. Desirability of statements about Exmoor according to non-visitors



E. Conclusion

E1. Summary

- E1.1. This non-visitor survey was designed to provide information from non-visitors to inform marketing strategies aiming to appeal to potential visitors and more broadly to increase visitor numbers to Exmoor National Park.
- E1.2. The data collected does not suggest that there are obvious negative associations or barriers to people's holidays on Exmoor; 49% of non-visitors said there was no particular reason why they hadn't visited Exmoor in the last 5 years.
- E1.4. This survey suggests that much of the Exmoor product is relevant to non-visitors. 93% of non-visitors said they were interested in taking countryside holidays, over 65% of non-visitors had taken a countryside holiday in the last 2 years and 66% had visited a UK National Park in the last five years.
- E1.5. This survey supports indications from National Opinion Poll (GfK NOP 2007) data that awareness of Exmoor as a National Park is high; 85% of non-visitors had heard of Exmoor before filling in the questionnaire. However, this survey suggests that although awareness of Exmoor is high, awareness of what to do there may not be; 21% of non-visitors said they 'did not know what is there/ to do'. 'Don't know much about it' and 'don't know what's there' also featured prominently in the 'what doesn't appeal about Exmoor' wordle. The implication for marketing is that messages about Exmoor might benefit from emphasis on what Exmoor has to offer in terms of activities and 'things to do'. Although awareness of Exmoor is high, awareness of 'what is there' can still be raised.
- E1.6. Data from this survey signals a number of key messages about how to 'package' Exmoor for the non-visitor. Short breaks in self-catering or camping/caravanning accommodation are particularly popular among recent 'UK only' holidaymakers. Preferences for these accommodation types and holiday lengths should be considered when marketing to non-visitors.
- E1.7. In terms of the activity preference profile, Exmoor's tourism product matches non-visitors preferences well in terms of short walks, long walks, visiting towns and villages, visiting attractions, wildlife watching and sightseeing by car/motorbike. However, many more non-visitors said they would like to undertake activities including cycling, mountain biking, horse riding, swimming and events/festivals than visitors to Exmoor actually undertook. Exmoor National Park can offer non-visitors many of these activities.
- E1.8. Perhaps it is a case of increasing awareness of activities that non-visitors like and linking them, in marketing messages, to popular accommodation types and holiday lengths. For instance, on a short break in self catering accommodation there would only be time for a few activities e.g. a long walk and visiting an event/festival. Marketing messages need not cram in all preferred activities or be prescriptive in packaging Exmoor e.g. camp on Exmoor and do mountain biking and swimming, but rather link types of holiday with different activity opportunities through images and associations in adverts, allowing non-visitors to pick the activity 'package' they desire.

- E1.9. On the basis of the Exmoor Visitor Survey 2010 it appears that the Exmoor visitor age profile is skewed towards people aged over 45. This survey highlights that non-visitors aged under 45 have different activity preferences to those aged over 45. Those under 45 displayed a higher preference for cycling, mountain biking, horse riding, swimming, watersports, events/festivals than those aged over 45. Clear marketing of these activity opportunities along with more usual Exmoor activities (walking, visiting towns and villages, sightseeing by car), may have particular impact on this younger age group.
- E1.10. It should be noted that all activities listed are mainly outdoor and day time activities. The desirability of Exmoor as Dark Skies Reserve is vital to the broadening of Exmoor tourism offer into the evening. ‘Food and drink’ was mentioned a few times as an activity preference; pub and restaurant food/drink is perhaps an underrepresented holiday ‘activity’.
- E1.11. All comments about marketing messages should be considered in the context of where they would be displayed. Marketing message in the wrong places will not reach the right market. Indications that the internet is more important for non-visitors than visitor respondents from the Exmoor Visitor Survey 2010 highlight the importance of this information channel. The significance of personal recommendation for non-visitors aged under 45 suggest personal endorsement is particularly important for this group. The high quality of the Exmoor tourism product goes some way towards this, but memorable visitor experiences, such as events/festivals or unique/exciting activities, seem particularly likely to be relayed to friends/family through personal recommendations.
- E1.12. This survey contributes to a wider body of research conducted by Exmoor National Park. Interpretation of data presented here relies on relationships with other research. Any one survey is a snapshot in time and space and cannot provide a complete picture of current or potential markets. Each piece of research broadens the range of information about visitor and non-visitor markets and to support future interpretations of Exmoor tourism.

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Appendix 1 – Questions and data

Have you holidayed anywhere on the map in the last 5 years?

	Non Visitor	Visitor	Total
Yes	66%	100%	74%
No	34%	0%	26%
Total no. Responses	215	65	280

Have you holidayed anywhere on the map in the last 5 years?

	Non Visitor	Visitor	Total
Yes	29%	83%	42%
No	71%	17%	58%
Total Responses	215	65	280

In the last 2 years what sorts of holidays have you been on?

	Non Visitors	Visitors	Total
Beach	70%	77%	71%
Countryside	65%	91%	71%
Historic towns and villages	38%	57%	43%
City break	48%	45%	47%
Active break	30%	46%	34%
None	3%	0%	2%
Total Responses	215	65	280

Where these...

	Non Visitor	Visitor	Total
UK holidays	84%	95%	87%
Overseas	71%	80%	73%
Self catering	55%	68%	58%
Hotel; B&B	43%	57%	47%
Camping/ caravanning	37%	75%	46%
Package	17%	14%	16%
Short break	52%	77%	58%
Week long	73%	63%	71%
2 weeks or over	38%	48%	40%
Total Responses	215	65	280

Where do you obtain information regarding a holiday? (please select all that apply)

	Non Visitor	Visitor	Total
Previous visit	35%	50%	38%
Personal recommendation	51%	69%	55%
Newspaper or magazine	12%	9%	12%
Tourist Information Centre	9%	25%	13%
Printed brochure / guide / map	24%	28%	25%
Internet	86%	88%	86%
Other; please specify	0%	0%	0%
Total Responses	214	64	278

Are you interested in visiting the countryside on holiday?

	Non Visitor	Visitor	Total
Yes	93%	97%	94%
No	7%	3%	6%
Total Responses	215	65	280

What activities would you be likely to undertake?

	Non Visitor	Visitor	Total
Short walk (under 2 hours)	79%	84%	80%
Long walk (over 2 hours)	57%	75%	62%
Visiting towns and villages	56%	64%	58%
Cycling	50%	64%	53%
Mountain biking	24%	29%	25%
Horse riding	14%	14%	14%
Country/field sports	6%	13%	7%
Swimming	39%	38%	38%
Watersports	24%	30%	26%
Visiting attractions	51%	62%	53%
Running	12%	14%	13%
Events / Festivals	54%	70%	58%
Sightseeing by car/motorbike	36%	35%	36%
Wildlife watching	32%	35%	33%
Other*	5%	3%	5%
Total Responses	197	63	260

*Sketching, food and drink, National Trust, Kite Flying, Rock Climbing, fishing, camping

Which of these images do you find most visually appealing as a UK tourism destination?

All Respondents	1st	2nd	3rd	4th	5th	6th	7th	8th	Mean
Minehead	81	70	63	30	21	6	6	3	2.63
Porlock ponies	69	49	44	35	32	25	14	12	3.37
Open Moorland	64	60	50	33	23	24	9	17	3.3
Historic Village	5	20	20	43	62	53	46	31	5.27
Porlock Weir boats	13	28	46	44	49	45	30	25	4.67
Lynmouth street scene	28	22	26	51	49	81	18	5	4.47
Bournemouth	12	17	19	28	25	17	72	90	5.95
City night life	8	14	12	16	19	29	85	97	6.34
Total responses	280								

Non-Visitors	1st	2nd	3rd	4th	5th	6th	7th	8th	Mean
Minehead	63	55	45	23	16	5	6	2	2.64
Porlock ponies	51	32	34	28	25	24	11	10	3.51
Open Moorland	46	46	35	24	21	18	9	16	3.46
Historic Village	4	13	16	29	42	44	40	27	5.41
Porlock Weir boats	10	22	31	31	36	34	27	24	4.82
Lynmouth street scene	23	20	24	42	38	53	11	4	4.28
Bournemouth	12	15	18	23	21	13	46	67	5.72
City night life	6	12	12	15	16	24	65	65	6.16
Total responses	215								

Have you holidayed in any UK national parks in the last 5 years; if so which ones

	Non Visitor	Visitor	Total
Brecon Beacons	18%	45%	24%
Broads	4%	9%	5%
Cairngorms	5%	2%	4%
Exmoor	0%	92%	22%
Dartmoor	13%	54%	22%
Lake District	32%	51%	36%
Loch Lomond	9%	6%	8%
New Forest	16%	40%	22%
North York Moors	5%	14%	7%
Northumber-land	6%	6%	6%
Peak District	22%	42%	27%
Pembrokeshire Coast	11%	29%	15%
Snowdonia	13%	31%	17%
South Downs	8%	12%	9%
Yorkshire Dales	12%	20%	14%
None	34%	2%	27%
Total Responses	214	65	279

If you have holidayed on Exmoor; when was your most recent visit?

In the last year	5%
Within the last 5 years	19%
More than 5 years ago	18%
I've never visited	59%
Total Responses	280

How often do you usually holiday on Exmoor?

Frequently (more than once a year)	8%
Occasionally (once every 1-5 years)	32%
Infrequently (5+ years)	61%
Total Responses	114

Do you have any particular reasons for not holidaying on Exmoor recently?

Distance	11%
Lack of transport	6%
Too busy / Never got round to it	17%
Doesn't appeal	5%
Don't know of its existence	8%
Don't know what is there / to do	21%
Visiting other places	29%
I don't take holidays	2%
No particular reason	49%
To close for a holiday	6%
Other*	5%
Total Responses	212

*Not on radar, narrow roads, health, money, have been nearby, relatives live elsewhere, go on holiday with family

What, if anything, appeals to you about holidaying on Exmoor in comparison to other UK destinations?

COUNTRYSIDE	COUNTRYSIDE	WEATHER IN SOUTH
BEAUTY NO CROWDS	RUGGED BEAUTY; CIDER	MOORS TO SEA
BEAUTY	WILDLIFE SCENERY	SOUNDS SIMILAR AND IS CLOSE
ATMOSPHERE PEACE AND QUIET	COUNTRYSIDE	TO DARTMOOR WHICH I LOVE;
PONIES	OPEN SPACES PUBS WALKING	CLOSEBY
CLOSE	WILD MOOR	COAST
SCENERY CLOSE TO BRISTOL	SCENERY	UNspoiled; WILD
BEAUTY QUIET PONIES	NATURAL BEAUTY	COUNTRYSIDE
BEAUTY NOT COMMERCIAL	LOVELY COUNTRYSIDE	THE BEAST OF EXMOOR;
SCENERY	SCENERY	CREAM TEAS
SPACE CLOSE	WILDERNESS	IT IS QUITE WILD AND LOTS TO EXPLORE; CLOSE TO BRISTOL
KNOWNOTHING ABOUT	SOMETHING DIFFERENT	CLOSE TO BRISTOL; IT'S A NATIONAL PARK
BEAUTY SPACE BASE FOR DAYS OUT	LONG WALKS; CLOSE TO THE COAST	COUNTRYSIDE
SOUTH WEST	HORSES	IT'S QUITE CLOSE; IT SEEMS NICE
ALL DIFFERENT WILD	QUIET AND NOT FULL OF TOURISTS AND TRAFFIC	UNTOUCHED
SCENERY QUIET COMBINATION OF BEACHES AND MOOR	REMOTENESS; NATURE; LACK OF BUILDINGS/ROADS;	BEAUTY; NATURE; LACK OF PEOPLE
CLOSE	WILDLIFE	SERENITY; PEACEFUL
PRETTY	COUNTRYSIDE AND COAST; FAMILY	NEVER BEEN SO WOULD LIKE TO SEE WHAT'S THERE
SPACE BEAUTY	PROXIMITY TO HOME; COUNTRYSIDE; PUBS	WILD PONIES
GOOD WALKS	THE LANDSCAPE	THE BEAST
SPACED DRIVEN OVER IT	COUNTRYSIDE; WALKING	HAVE ACOTAGE IN PORLOCK
THE WILD HORSES; LYNMOUTH	PEACEFUL HOLIDAYS WITH THINGS TO DO	IT'S THE WEST COUNTRY.
POINT BREAK	VARIETY OF SITES	LIGHER ATMOSPHERE AND LESS LIGHT POLLUTION
CLOSE TO BRISTOL BEAUTIFUL	WILDLIFE; CONTRY PURSUITS	NOT SURE
OPEN COUNTRY WILDLIFE	BEACHES AND OPEN SPACES	COUNTRYSIDE; MOORLAND
QUIET FEW PEOPLE	ESCAPE; QUIET	IT'S CLOSE; HEARD IT'S BEAUTIFUL
DIFFERENT COUNTRYSIDE	PEACE AND QUIET	IT'S NOT TOO FAR; VERY PICTURESQUE
COUNTRYSIDE	SCENERY; LOCATION (NOT TO FAR); VARIETY OF ACTIVITIES	IT IS PRETTY; GOOD WALKING SPACE; QUIET; LANDSCAPES
QUIET MOUNTAIN BIKING	THE PONIES ARE BETTER THAN THOSE ON DARTMOOR	QUITE CLOSE
MOUNTAIN BIKING	CHEAP; EASY	SCENERY
OPEN SPACES	HORSES	COUNTRYSIDE; WILDLIFE; SERENITY
BIG HILLS AND MTB	NOTHING - PARENTS DECISION TO VISIT	DONT KNOW MUCH ABOUT THE PLACE
WOULD LIKE EXPLORE NOT COMMERCIAL	COUNTRYSIDE; WILDLIFE	IT'S UNSPOILT COUNTRYSIDE
COUNTRYSIDE	NATURAL BEAUTY	CLOSEBY
MOUNTAINS	GOOD FOR TAKING PHOTOGRAPHS	WILD SCENERY
NICE WALKS COUNTRYSIDE	CURIOS AFTER FILLING IN QUESTIONNAIRE	NOTHING IN PARTICULAR COMPARED TO OTHER NATIONAL PARKS
EMPTY SPACE CAMPING	IT'S SOUTH	SCENERY; GEOGRAPHICAL FEATURES; COAST
QUIET NATURAL SCENERY CAMPING	I DON'T KNOW MUCH ABOUT IT FAIRLY CLOSE TO HOME AND FEELING OF SPACE	PROXIMITY; WALKING
COUNTRYSIDE	WEATHER	NATIONAL PARK
CLOSE BY	CLOSE TO BRISTOL	COASTLINE
QUIET	DON'T KNOW	DUNSTER
SCENERY PEACEFUL	SCENERY; CLOSE TO HOME	MOORLAND; COUNTRYSIDE
LOCATION	FLOWERS	WALKING
LONG WALKS	PEACEFUL	HIDDEN VILLAGES
CLOSE BY NICE COUNTRYSIDE	WARMER THAN THE NORTH; PRETTY AREA	FOOTPATHS
SCENERY	COUNTRYSIDE; PEACE AND QUIET; LOVELY BEACHES	HORSE RIDING
PRETTY		COUNTRYSIDE
THE CLIFFS		
IT HAS A BEAST		
GREENERY; LACK OF CIVILISATION		
FORESTS		
CLOSEBY; WALKING		
BEAUTIFUL COUNTRYSIDE		
MOUNTAIN BIKING AND ROAD CYCLING		

What, if anything, doesn't appeal to you about holidaying on Exmoor in comparison to other UK destinations?

COSTS LESS IN NORTH, LESS SUN	EXPENSIVE SHORT TERM PARKING	BORING
DONT KNOW COASTAL TOWNS	PARKING CHARGES	RATHER GO TO LAKES OR PEAKS
NO	EXMOOR DOESNT HAVE ACCOMODATION AND ACTIVITIES IN ONE LOCATION	DISTANCE FROM MY HOME
NO	WITHOUT CARS - LIKE CENTRE PARCS WHICH IS CLOSE TO HOME BUT IVE HOLIDAYED THERE	NOTHING
WEATHER ROADS BLEAK	WEATHER LACK OF WIFI	NOTHING
DONT KNOW WHATS THERE	BLEAKNESS	NOT ENOUGH MOUNTAINS
MIST	DONT KNOW WHATS THERE	BAD CLIMBING?
WEATHER FINDING COTTAGES	DONT KNOW MUCH ABOUT IT	NOT AS BEACHY AS I LIKE
PLACES TO TAKE DOGS	NOT ALWAYS WHAT I AM	NOTHING
SCARRRY INACESSIBLE TO DISABLED	LOOKING FOR	PUBLIC TRANSPORT
KNOW NOTHING ABOUT IT	THE WEATHER; DONT KNOW IT	NOTHING
ITBLEAK	THE WEATHER	LACK OF YOUTH HOSTELS
JUST A MOOR BASKERVILLES	THE DISTANCE	NOTHING
PLACES DONT TAKE DOGS	RAIN	TOO MANY CARAVANS
TOO CLOSE	DONT KNOW ENOUGH ABOUT IT	I DONT KNOW
CHILDREN FAR FROM TOWNS	A BIT BORING	IT LACKS VARIETY IN TERMS OF OTHER ACTIVITIES - NO
EG DOCTORS	DISTANCE; DONT KNOW WHAT EXMOOR HAS TO OFFER	NIGHTLIFE
PRACTICALITIES	I DONT KNOW MUCH ABOUT IT	MY MOTHER LIVES THERE AND I WOULD FEEL AS THOUGH I SHOULD VISIT HER OFTEN
LACK OF EVENING ACTIVITIES	IT'S QUITE FLAT AND DULL	VISIT FRIENDS IN OTHER PLACES
DONT KNOW ABOUT IT	LONG WAY AWAY	NOTHING
INCONSTENT SURF	NOTHING - LACK OF AWARENESS	NO CENTRAL POINT OF INTEREST
ACCESS POOR ROADS	JOURNEY - DONT HAVE A CAR	WEATHER
LEAST WILD NP	OLD PEOPLE	LACK OF RAIL LINKS
EXPENSIVE	NOTHING	NOTHING
TOURIST ATRACTIONS	DON'T KNOW	CAN BE BLEAK
NOT ON RADAR	JUST NEAR ENOUGH FOR A DAY TRIP	DON'T KNOW IT WELL
TOO CLOSE	REMOTE	NARROW ROADS
TOO ISOLATED	NOTHING	TRANSPORT
POOR PUBLIC TRANSPORT		WEATHER
NARROW ROADS; CROWDS		
NOT ADVERTISED		
HUNTING		
NOT SURE HOW TO GET THERE		
RIVERS BETER ON DARTMOOR		

The following are facts about Exmoor National Park. Please rate their desirability.

All Respondents	Strongly Desirable	Desirable	Indifferent	Undesirable	Strongly Undesirable	Mean
Exmoor is a haven for wildlife with wild ponies and red deer roaming freely	46%	42%	11%	0%	0%	1.67
The Exmoor coastline includes the highest cliffs in the country	32%	44%	20%	3%	1%	1.97
Exmoor is a great destination for outdoor activities	31%	41%	25%	2%	1%	2.03
Exmoor is one of the leading destinations for sustainable/ green tourism	23%	45%	30%	2%	1%	2.14
Exmoor has a wealth of history and heritage including medieval villages	26%	50%	20%	4%	1%	2.05
Exmoor is Europe's first ever International Dark Sky Reserve, with dark and starry night skies	32%	42%	23%	2%	1%	1.97
Exmoor offers plenty of opportunities to relax and unwind	36%	52%	10%	2%	0%	1.79
Total response	266					

Non-Visitors	Strongly Desirable	Desirable	Indifferent	Undesirable	Strongly Undesirable	Mean
Exmoor is a haven for wildlife with wild ponies and red deer roaming freely	45%	42%	13%	1%	0%	1.69
The Exmoor coastline includes the highest cliffs in the country	29%	47%	19%	4%	1%	2.00
Exmoor is a great destination for outdoor activities	29%	40%	27%	3%	1%	2.05
Exmoor is one of the leading destinations for sustainable/ green tourism	20%	45%	32%	3%	1%	2.20
Exmoor has a wealth of history and heritage including medieval villages	24%	51%	20%	5%	0%	2.06
Exmoor is Europe's first ever International Dark Sky Reserve, with dark and starry night skies	31%	42%	24%	3%	1%	2.00
Exmoor offers plenty of opportunities to relax and unwind	33%	55%	11%	2%	0%	1.83
Total Responses	201					

If you are to visit Exmoor in the next 3 years is your visit most likely to be?

	Non Visitor	Visitor	Total
A day visit	23%	19%	22%
A short break (1-3 nights)	64%	70%	65%
A holiday (4+ nights)	17%	23%	18%
Don't expect to visit	8%	0%	6%
Total Responses	212	65	277

Before today had you heard of Exmoor?

Yes	85%	100%	89%
No	15%	0%	11%
Total Responses	215	65	280

Do you have any further comments about Exmoor as a holiday destination?

NOT COMMERCIAL, SIMPLIFIED COLOUR CODED MAP WOULD BE GOOD - NOT OS
 DONT THINK OF IT AS A DESTINATION; JUST BLANK SPACE ON MAP
 DOG ACCOMODATION NEEDED, DRIVEN ACROSS EXMOOR NOT VISITED
 COASTAL FOOD OR REGIONAL FOOD COULD BE ADVERTISED MORE
 TRAIN LINKS COULD BE BETTER EG TO MINEHEAD
 JUST DAY VISIT
 NEEDS A FOCAL POINT FOR AMENITIES WITH GOOD QUALITY, REASONABLY PRICED ACCOMODATION
 FACILITIES; CAMPING; ACCESS?
 LOVELY PLACE
 FIRST VISIT LAST WEEK VERY LIKEY TO GO AGAIN
 IT'S GREAT
 PONIES
 SOUNDS LIKE SOMETHING I ENJOY
 BETTER AWARENESS THROUGH ADVERTISING; MAYBE TV AND RADIO; PREFERABLY ON THE BBC; ALSO
 INTERNET ADVERTISING
 MORE INTERNET MARKETING CAMPAIGNS
 SOUNDS IDYLIC
 SOMEWHERE I INTEND TO VISIT
 IT WOULD PROBABLY BENEFIT FROM SOME CANNY MARKETING
 GREAT PLACE TO GET AWAY FROM IT ALL
 ENCOURAGE DISADVANTAGED DEMOGRAPHICS TO THE PARK
 SOUNDS NICE - I MIGHT GO NOW!
 WISH I WAS MORE INFORMED ABOUT WHAT EXMOOR HAS TO OFFER
 YOU SHOULD PROMOTE THE CYCLE HILL CLIMB FROM LUCCOMBE UP DUNKERY BEACON. 10/10 IN UK'S
 GREATEST CYCLING CLIMBS BY SIMON WARREN
 IT'S QUITE CLOSE - GOOD FOR A SHORT BREAK
 VERY NICE

Do you usually holiday... (tick all that apply)

	Non Visitor	Visitor	Total
Individually	10%	15%	11%
With partner	52%	45%	50%
With family inc children	29%	40%	32%
With a group of friends / relatives	53%	57%	54%
With an organised tour	3%	0%	2%
Other; please specify	0%	0%	0%
Total Responses	215	65	280

What is the first half of your post code?

BS7	BS5	BS49	INTERNAT	OX3	BN2	BS6	GL8
BS8	GL8	KT5	IONAL	SL4	N5	BA3	SN16
BS4	BA4	OX5	OX2	BS2	CM2	SN9	SL6
W14	TA10	BS35	BS3	BN	SR2	SW7	OX4
NN10	BS3	BS29	BA3	TA6	BA6	BS6	BS20
BS9	BS2	KT5	PL20	OX3	BS5	BS5	GL5
BS3	SW11	BS7	INTERNAT	WA4	N16	GL5	GL5
FK12	DT10	DT6	IONAL	BS4	INTERNAT	SN8	WA7
WR3	BA4	BS6	BS6	INTERNAT	IONAL	SW4	BS7
W14	BS6	BS9	N22	IONAL	Y021	BS7	BS31
BS8	BS6	BA21	BS25	SG19	TA7	BS7	GL5
BS7	RG4	SN16	GU5	OX2	BA2	GL5	EA2
BS40	BA7	BA14	AL3	LE15	N16	SN8	SA17
SE3	INTERNAT	BS6	BS14	CB11	INTERNAT	NW2	BS6
W14	IONAL	BS32	BS9	INTERNAT	IONAL	BS7	SN5
BS9	BS48	AB41	LE2	IONAL	SK22	BS6	NW2
BS48	BS8	LE11	RG1	ML10	BA5	GL5	SW4
GL7	GL12	BA14	OX2	OX10	BA21	SN8	PT17
BS4	BA6	BS13	BS6	OX1	N16	NW1	BS2
PO21	BS10	BS40	BA21	LS6	BS41	BS6	SN5
BS48	BS3	TR11	ST8	B55	LN9	BS6	NW4
BS5	BS40	WR2	NG18	BN17	BA2	SN16	RG1
GL7	GL7	BA21	OX2	OX4	N16	SL3	BS5
BS7	RH16	BS16	BS9	SP4	BS3	SW7	BS5
BS39	LE2	GL50	BA21	LS6	BS2	BS4	BS1
BS3	BS3	E17	BA12	BS5	BS5	BS8	BS6
BS3	BS40	WA2	OX2	CT	PE4	SN16	BS14
GL12	GL7	SW14	OX2	RG8	OX1	SN16	BS14
OX15	RG40	BS21	BS2	NN5	BS3	NW3	BS6
TP2	TW18	BS39	SW9	BS6	BS6	BS16	BS6
BS16	BS41	WR4	SE23	BA11	GL12	BS6	BS6
BS6	BS49	RG21	LA11	BN21	E18	SN16	
SW11	AB41	SL3	OX2	LL	S73	SN16	
TR4	BA5	CH66	BS6	TW1	BS20	RG12	
BS39	BA5	B97	INTERNAT	N16	BS6	BS5	
BS3	BS3		IONAL	BA11	BS6	BS31	

How do you define your gender?

	Non Visitor	Visitor	Total
Male	51%	54%	52%
Female	48%	45%	47%
Prefer not to say	1%	1%	1%
Total Responses	215	65	280

Is your age group?

	Non Visitor	Visitor	Total
16-24 years	24%	28%	25%
25-44 years	42%	47%	44%
45-64 years	25%	19%	24%
65+ years	7%	6%	6%
Prefer not to say	2%	0%	1%
Total Responses	215	65	280

Do you consider yourself to be a member of a minority ethnic community?

	Non Visitor	Visitor	Total
Yes	7%	3%	6%
No	88%	95%	90%
Prefer not to say	5%	2%	4%

Do you have any longstanding health issues or disabilities that limit your daily activity?

	Non Visitor	Visitor	Total
Yes	2%	6%	3%
No	94%	92%	94%
Prefer not to say	4%	2%	3%
Total Responses	215	65	280



Exmoor National Park Authority
Exmoor House, Dulverton, Somerset, TA22 9HL
Telephone: (01398) 323665 Fax: (01398) 323150
www.exmoor-nationalpark.gov.uk

Enhancing
the qualities that make **Exmoor**
special