

exmoor strategic action plan for sustainable tourism

2013-2018



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2013-2018

Produced by the Exmoor Tourism Partnership



Core Partners



Exmoor Tourism Partnership

Sustainable Tourism strategy 2013-2018

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A. Introduction

A1. Sustainable Tourism on Exmoor

Exmoor is blessed with some of the UK's finest scenery and landscapes. Co-ordinated and collaborative partnership working between the industry and local, regional and national tourism bodies is essential to fulfil the aims and objectives of the Exmoor Tourism Partnership.

Exmoor is already established as a leading destination for sustainable tourism. In 2007 the National Park was recognised as one of the first National Parks in the country to gain the European Charter for Sustainable Tourism in Protected Areas. This Strategic Action Plan sets out a shared vision for tourism on Exmoor, a set of objectives and an action plan. Collectively these will serve to guide key stakeholders in continuing to develop the area as a high quality and sustainable tourism destination.

Tourism is often described as the lifeblood of Exmoor. Worth over £225m¹ a year to the Greater Exmoor area and supporting over 4350¹ full time equivalent jobs it is not hard to see why. Virtually everyone in the area feels the impact of tourism with many jobs, businesses and local services dependent upon the visitor economy.

However the Exmoor region is a special place and home to the Exmoor National Park, the Quantock Hills Area of Outstanding Natural Beauty as well as a Heritage Coastline. A key component of the rural landscape is the integrity of the coast and countryside. In order to further develop the tourism sector actions need to be innovative and focus on the area's natural assets (which form the bedrock of the sector) whilst maximising economic benefits within the area, which is one of the most deprived in the country. The strategy is therefore based upon the need for sustainable tourism. In this instance this is defined as tourism which balances the needs of visitors, communities, businesses and the 'place'. It is not confined to 'green' or 'eco' tourism but seeks to support viable and profitable businesses that are based upon and helping to conserve and enhance the environment and local communities that host them and upon which many are dependent on.

The European Charter for Sustainable Tourism defines sustainable tourism as *“any form of development, management or tourist activity which ensures the long term protection and preservation of natural, cultural and social resources and contributes in a positive and equitable manner to the economic development and well-being of individuals living, working or staying in protected areas.”*

This strategic action plan primarily covers the Exmoor National Park and the area administered by West Somerset Council, often referred to as the Greater Exmoor area. The plan seeks to provide a common approach to the development, support and delivery of tourism for all those involved. The Greater Exmoor area is usually defined as the Exmoor National Park plus those parishes within 10 miles of the boundary which includes all of the

¹ STEAM report for Exmoor influence area 2011, GTS (UK) Ltd.

district of West Somerset. It also takes in parts of North Devon outside of the National Park where tourism work is largely covered by North Devon+ in conjunction with other local bodies. Within all this it is important to note that close working is essential with a view to fuzzy, overlapping boundaries as the visitor rarely sees or is interested in political or administrative boundaries.

A2. The Exmoor Tourism Partnership

The Exmoor Tourism Partnership was formally created in 2009 following detailed discussions and consultation during the preceding year following the closure of Visit Exmoor Ltd. It acts as a virtual partnership to co-ordinate tourism support and delivery activities between key players within the area, playing a particularly important role in linking the private and public sectors together.

The partnership has oversight of this strategic action plan and has led its development bringing together in one place individual partner actions, visions, objectives and strategic documents. Taking those elements that are most relevant to tourism enables meaningful dialogue and appropriate action, reducing duplication and adding value.

Core partners are currently the Exmoor Tourist Association, West Somerset Council, North Devon+, Exmoor National Park Authority and Somerset County Council. Key partners also attend quarterly meetings and include Quantock Hills Area of Outstanding Natural Beauty and the Somerset Tourist Association.

Whilst there is a clear governance document that all partner sign up to it is important to note the virtual nature of the partnership. It is not a stand alone organisation and has no resources or bureaucracy attached. However working together additional resources have been secured within and outside the partner organisations and significant progress made on which to build upon.

In addition the Partnership works with a wider network of smaller local or thematic based tourism associations operating in the area to ensure as much grass roots involvement as possible. Whilst it would be unworkable to include all these organisations at regular meetings of the partnership representatives are invited to sit on both task and finish groups as well as ongoing sub groups. An annual Exmoor Tourism conference provides the opportunity to bring all interested parties together once a year in addition to partners own events.

A3. Development since last strategy

This Strategic Action Plan follows the 2004-2009 action plan which was developed under the auspices of the QUEST project² (Quality Underpins Exmoor's Sustainable Tourism). In order to both accommodate a period of significant transition in tourism delivery in the area and to bring the strategic action plan timescales in line with the Europarc Charter validation period

² The QUEST project was a national demonstration pilot project for sustainable tourism, hosted by the Exmoor National Park Authority with funding from the former Countryside Agency.

(2007-2012) a supplementary action plan was drawn together by the Exmoor Tourism Partnership covering its formative years 2009-2012.

There has been tremendous change since the initial strategic action plan. Most significantly the infrastructure for tourism support and delivery has changed radically at a national, regional and local level with many organisations no longer existing (such as Visit Exmoor Ltd, N Devon Marketing Bureau, South West Tourism, the Regional Development Agency and others) and with new organisations being introduced (e.g. North Devon+, Exmoor Tourism Partnership, the Heart of the South West Local Enterprise Partnership etc). The country has also faced a prolonged recession sparked by the financial crisis of 2007 - 2008 which has resulted in a huge programme of public spending reductions to reduce the national deficit and changing trends in visitor habits.

However much progress has been achieved since 2004 including the following highlights:

- Evolution of the Exmoor Tourism Partnership offering an effective vehicle to co-ordinate tourism work between key players
- Redevelopment of the Visit Exmoor website (www.visit-exmoor.co.uk) as the primary tourism site to the area and removal of duplicate sites
- Development of a unified co-ordinated brand for Exmoor
- Agreement of a 3-year marketing strategy and delivery of a range of marketing campaigns
- Development of www.exploremoor.co.uk as a one-stop site for public transport information
- Secured funding from a range of partners
- Completion of the Coleridge Way linking the National Park and Quantock Hills AONB
- A regular programme of visitor research
- Designation of Exmoor National Park as Europe's first Dark Sky reserve
- Delivery of the successful Active Exmoor project developing the areas' outdoor activities and awareness of opportunities
- Sustainable tourism principles embedded into core aims of the Exmoor Tourism Partnership and marketing strategy

This new strategic action plan seeks to continue the journey. It should be seen as a continuation and revision of previous action plans as we adjust to the challenges and opportunities that will avail themselves to us over the next 5 years and accommodate changes to the priorities and work programmes of constituent partner organisations.

A4. A strategy for Exmoor

Whilst the core partners of the Exmoor Tourism Partnership have taken the lead in drafting this strategic action plan it should be viewed as a strategy for tourism on Exmoor relevant to all who live in, work in, visit and love Exmoor. The significant challenges and opportunity facing Exmoor (see B7) will impact on us all and only by working together will we make the most of these situations.

In particular the current deficit reduction programme will unquestionably lead to further

reductions in the resources and capacity of public sector organisations. Whilst the continued involvement of these organisations is essential for the delivery of this strategic action plan the private sector will need to rise to the challenge to engage further and take on a more active leadership role in developing and supporting sustainable tourism on Exmoor. This in itself offers a significant opportunity for the industry to take the reins and direct its own future in the coming years working with partners for mutual benefit continuing the recent progress made in reducing duplication and adding value.

A5. Preparation and overview

This strategic action plan draws together the key strategic documents and policy objectives of partners relevant to tourism. Whilst each of these has been subject to significant public and industry consultation this strategic action plan has also been subject to consultation and is also based upon research evidence gathered relevant to sustainable tourism in the area.

Once drafted the plan was shared with the wider grouping of tourism associations within the Exmoor Tourism Network. The plan outline and strategic objectives were also discussed by the Exmoor Parish and Consultative Forum and all known businesses in the area were invited to review the draft. The draft was also reviewed by other relevant staff, as appropriate, in partner organisations.

Following this introduction are a further 3 key sections:

- State of Tourism: Providing an overview of the tourism product and impacts on the area.
- Strategic objectives: Providing an overview of the overarching objectives and the strategic activities to deliver them
- Action Plan: A detailed work programme prioritising individual partner actions.

Figure B1: Map of Exmoor, West Somerset Coast and Quantock Hills AONB



B. State of Tourism

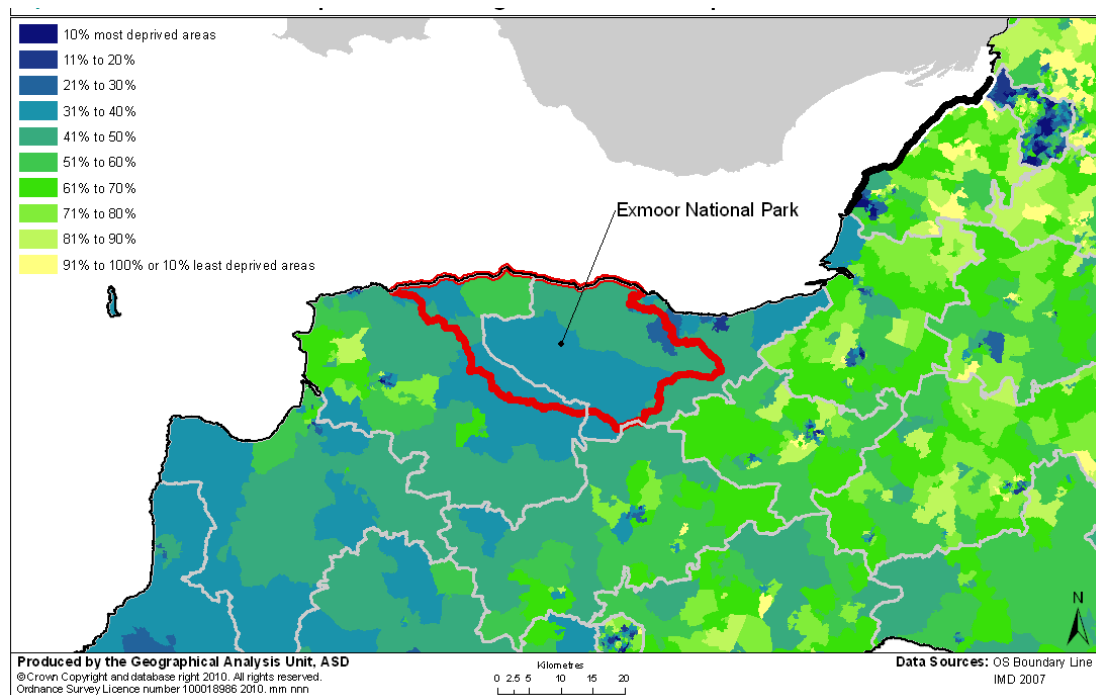
B1. Introduction to Greater Exmoor

Exmoor is one of the country's most diverse destinations. It incorporates the Exmoor National Park, Quantock Hills Area of Outstanding Natural Beauty and a heritage Coastline (see figure B1). Within these 3 areas there are a mix of natural and built environments including moorland, beaches, coastal cliffs, traditional resorts, rural villages, wooded valleys, historical features and heritage attractions.

Across Exmoor unemployment rates are low compared with the national rate (2.9% Exmoor National Park, Somerset 2.4%, SW 2.6%, England and Wales 3.4% at the 2001 census) but average weekly earnings are also low. For example, full-time male weekly earnings averaged £383.90 in North Devon in 2010 – only 77% of the UK average of £501.80. There has been an increase in uptake of jobs on Exmoor by young people from Eastern Europe, particularly in hotels and catering businesses and the services sector.

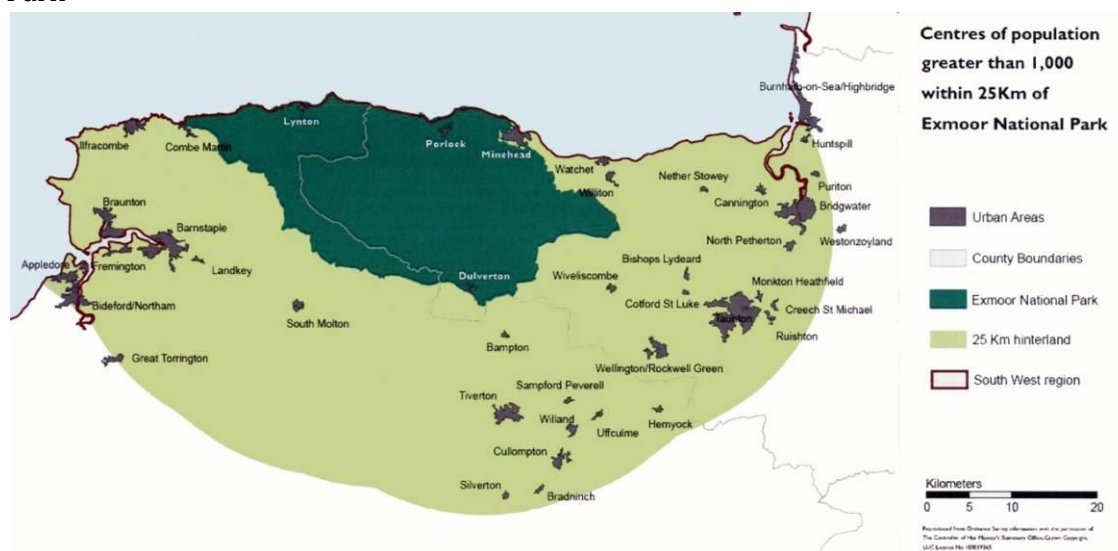
The 2007 Index of Multiple Deprivation (IMD) shows that the majority of the Exmoor area is within areas which are just below the average deprivation suggesting an overall picture of relatively low levels of deprivation, albeit that these figures can obscure local variations such as some higher levels of deprivation in areas of West Somerset outside of the National Park (see figure B2).

Figure B2: Levels of deprivation in Exmoor National Park according to the Indices of Deprivation 2007



Beyond the protected landscapes of the National Park and the Quantock Hills AONB the surrounding area remains as one of a largely rural nature with few large urban centres. Over half of the population of West Somerset district live in the three main settlements of Minehead, Watchet and Williton³. Figure B3 shows centres of population greater than 1,000 within 25km of the National Park incorporating the Greater Exmoor area.

Figure B3: Centres of population greater than 1,000 within 25 km of Exmoor National Park



B1.1 The Exmoor Brand

Significant time and effort has been spent in recent years to define the brand of Exmoor and during this process it was agreed that Exmoor is the brand name that encapsulates the 3 distinct areas. A brand mapping exercise by the former regional tourist board – South West Tourism - identified Exmoor as a strong brand for the South West (which is the UK's top holiday destination in terms of both volume and value of domestic tourism⁴). The report⁵ stated that “The north and south coastal resorts and beaches, as well as Dartmoor and Exmoor, featured highly in the initial spontaneous associations. Devon and the West of Somerset, in the minds of all consumers, tended to be distinguished by coast and moorland / countryside”.

A workshop with key stakeholders identified a series of meanings stakeholders attach to Exmoor (see figure B4) and these have since been distilled down to provide the brand footprint of Exmoor as a place to “Dream, Discover and Explore”.

³ West Somerset Economic Strategy 2011.

⁴ Visit England Tourism fact sheet 2011v2.

⁵ South West Brand Mapping report, South West Tourism (undated).

Figure B4: Meanings of Exmoor⁶

<i>Coast/Countryside</i>	<i>Rural Communities</i>	<i>Places of interest</i>
<i>England but another world</i>	<i>Essential for the soul in a modern life</i>	
<i>Place of natural beauty</i>	<i>Tranquillity x2</i>	<i>Condensed beauty</i>
<i>Coast /Moor/Countryside x 2</i>	<i>Time stands still (or not)</i>	<i>Small National Park</i>
<i>Big Country</i>	<i>Dark night skies x2</i>	<i>Big Views</i>
<i>Escape</i>	<i>Friendliness x3</i>	<i>Olde worlde</i>
<i>Clean air</i>	<i>Has the Ex Factor</i>	<i>Spectacular countryside</i>
<i>Outdoor life</i>	<i>Time stands still</i>	<i>Thatched houses</i>
<i>Stone buildings</i>	<i>Countryside</i>	<i>Local produce</i>
<i>Explosive scenery</i>	<i>Reliable quality</i>	<i>Always welcome</i>
<i>Adventure</i>	<i>Discovery</i>	<i>Tradition</i>
<i>Innovation</i>	<i>Wildlife</i>	<i>Wonder</i>
<i>Spiritual refreshment</i>	<i>Away from the hurley burley</i>	<i>Warm</i>
<i>Nearer than you think</i>	<i>Good food</i>	<i>Accessible</i>
<i>An area of records (tallest tree, Steepest Hill, Highest cliffs...)</i>		
<i>Ponies</i>	<i>Deer</i>	<i>Wild coast</i>
<i>Rolling countryside</i>	<i>Diverse country side</i>	<i>Walking</i>

The brand identity has to work independently and together with the existing strong identities held by both the National Park and the Quantock Hills AONB. Whilst these are strong brands for each area they are not universal and are also used as corporate identities for their respective managing bodies and so cannot be circulated for wider use by individual organisations.

The brand image developed is a modern approach incorporating an illustration of a stag's head as one of the most iconic symbols of the area. The primary colour is purple which represents the areas of moorland and works well in conjunction with other brand identities such as those existing for the National Park and Quantock Hills AONB and existing organisations such as the Exmoor tourist Association.

The logo comes in different forms with the primary incorporating 'Dream, Discover, Explore' as a tagline and secondary logos to be used geographically specifically mentioning the 'Coast and Quantocks' and 'National Park'. This allows a strong identity to be developed whilst still reflecting local distinctiveness (see figure B5). The term Greater Exmoor (as defined in A1) is not generally used as a marketing term.

Figure B5: Exmoor tourism brand logos



⁶ Exmoor brand workshop report, Jon Jeffries, GreenMarker Ltd, 2010

B1.2 Exmoor National Park

Designated in 1954 Exmoor is one of 15 National Parks in the UK, known collectively as 'Britain's Breathing Spaces'. It covers 267 square miles and is designated for two core purposes⁷:

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Parks and
- To promote opportunities for the understanding and enjoyment of the special qualities of the Parks by the public

The special qualities, as defined in the Exmoor National Park Partnership Plan can be seen in figure B6. Its National Park status guarantees natural beauty of the highest order and an abundance of wildlife, including the Exmoor Pony and wild red deer.

It is important that the National Park is recognised as a living landscape (English National Parks are designated as category V protected areas by the IUCN). The landscape seen today has been, and continues to be shaped by over 8000 years of human influence; today the National Park is home to over 10,800 local residents with an ageing population. The proportion of those aged 65 is relatively high and growing whilst those under 15 is relatively low and decreasing. Administratively the National Park straddles the border of Devon and Somerset with approximately 2/3 in West Somerset and 1/3 in North Devon. The National Park Authority is the local planning authority but other local government services continue to be provided by the respective district and county councils.

Exmoor was designated a National Park due to its relatively wild and unspoiled landscape offering potential for outdoor recreation for a large number of people. Exmoor is one of the smaller National Parks and also quieter than many others. This brings a constant challenge as visitor numbers are lower than many other National Parks, which many businesses and local communities would like to see changed and yet this is a very strong attractor to those that do visit the area. However consultation for the 2007-2012 National Park Management Plan revealed strong support from local communities and visitors for a growth in visitor numbers by up to 25% and it is believed this can be accommodated if managed carefully. Direct comparisons with other National Parks is not always helpful as there are a range of factors to be considered such as the size of the area, the local population within the National Park and within an hours drive, transport links, accommodation capacity and much more.

Tourism is the predominant component of the local economy, followed by land management such as agriculture and forestry. It is estimated that over 2,500 full time equivalent jobs are supported by tourism⁸.

The main resorts are Lynton and Lynmouth, Porlock, Dunster and Dulverton although many attractions and accommodation are based within smaller settlements, villages and isolated properties across the area.

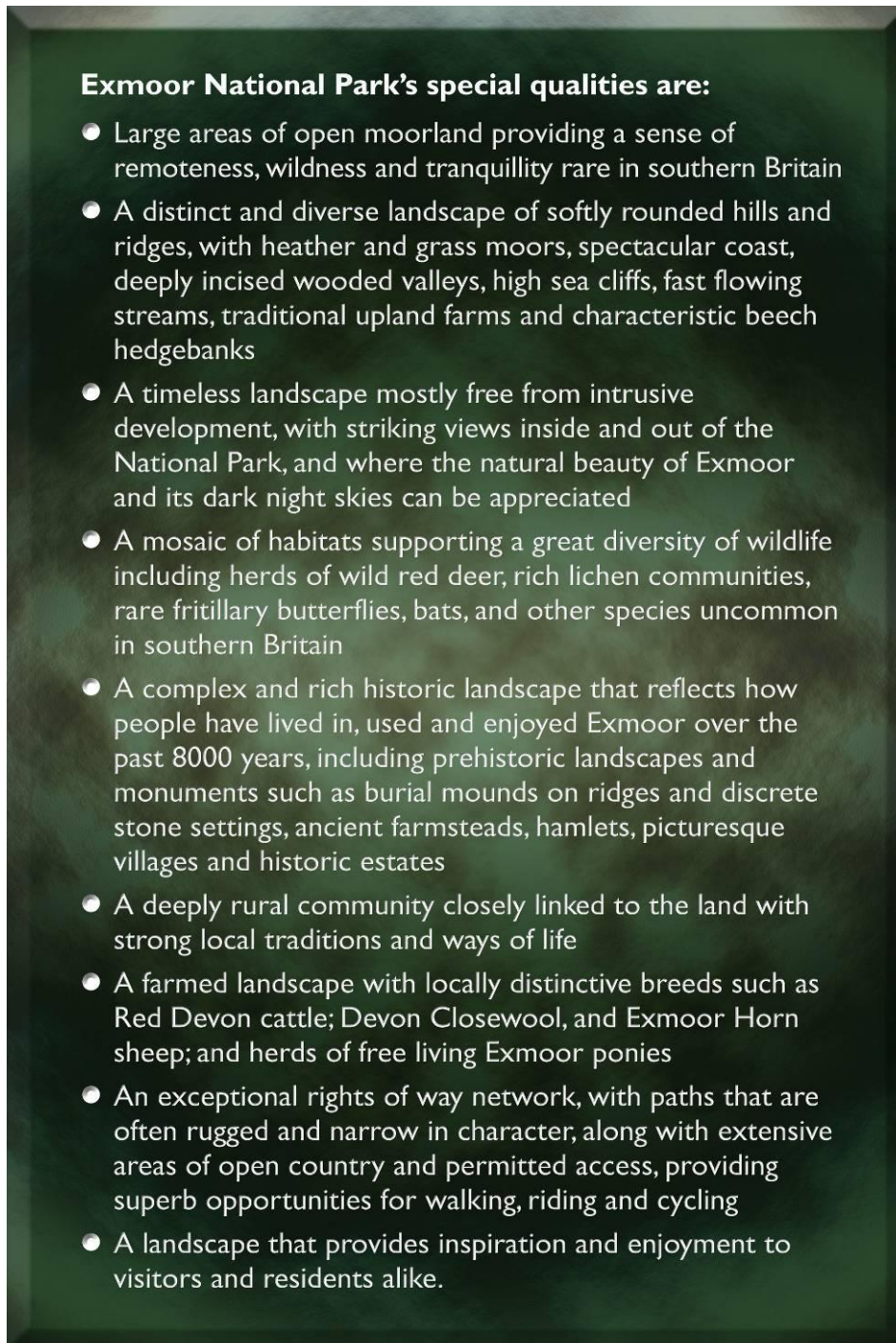
⁷ 1949 Environment Act

⁸ Exmoor National Park STEAM report, 2011, GTS (UK) Ltd

Significant honey pot sites include the ancient clapper bridge at Tarr Steps, the Valley of Rocks on the north coast, the National Trust estate at Watersmeet, the medieval village of Dunster and Dunkery Beacon – the highest point on Exmoor at 619m and also owned by the National Trust.

In 2011 the National Park was recognised as Europe's first ever Dark Sky Reserve in recognition of the dark skies, their protection and opportunities being offered to allow people to experience and understand dark skies and associated features such as stargazing.

Figure B6: Special Qualities of Exmoor National Park



B1.3 Quantock Hills Area of Outstanding Natural Beauty

The Quantock Hills Area of Outstanding Natural Beauty (AONB) was the first area to be designated an AONB in 1956, consisting of a narrow, gently curving 19-km ridge, running north-west from the Vale of Taunton Deane to the Bristol Channel coast. Standing out above the agricultural plain, the ridge looks far more imposing than its actual height of 245 to 275m and is famous for its views that, by repute, stretch over nine counties. For so small an area, the landscape shows immense variety and on its heights, a surprising air of solitude and wildness.

The rocky Jurassic coastline, exposed heathland summits offering panoramic views, deep wooded combs, undulating farmland and attractive villages are key attractors of the protected landscape. The heathland and sessile oak woodlands of the AONB are nationally important wildlife habitats, notably rich in species. Much of southern Britain's heathland has vanished or survives as fragments, making the AONB's extensive heaths particularly valuable. Native red deer still roam the Quantock Hills.

The rural economy is based on mixed farming, dominated by dairying, sheep and beef rearing. A large part of the Quantocks plateau is open common with traditional grazing rights. Forestry and small-scale quarrying are secondary activities. There are no towns in the AONB but a number of attractive red sandstone villages. Tourism is a significant part of the economy, based on farm accommodation and guest houses. The AONB is also a highly popular local recreational area with heavy demand from the towns on its fringe⁹.

B1.4 West Somerset Coast

The West Somerset Coast incorporates the coastline from Minehead to Hinkley Point as well as the inland strip between the National Park and Quantock Hills including Williton.

Minehead is the largest town in the area with a population of 12,500 rising to up to 35,000 in the peak visitor season¹⁰. It acts as an important service centre for many of the smaller outlying towns and villages of West Somerset and Exmoor.

Minehead sits on the very edge of the National Park and is also a tourist attraction in its own right as a traditional seaside resort with its promenade, long sandy beaches with views to South Wales and a traditional harbour. The South West Coast Path starts its 630 mile journey along the coastline to Poole harbour on the promenade. Minehead is also home to Butlins, the largest employer in the District, which is by far and away the largest accommodation provider sleeping over 5,000 at any one time in peak periods. In recent years greater links have been formed between Butlins and other tourism interests with the holiday park sponsoring key events such as the Minehead Summer festival. The main town centre lies between Butlins at one end and the old harbour at the other and is home to the terminus of the West Somerset Railway, one of the longest heritage railways in the country..

Watchet is a small harbour town of about 4,000 people, at the mouth of the Washford River sandwiched between the Brendon Hills, Quantock Hills and the moorlands of Exmoor. The

⁹ Association for AONBs website

¹⁰ West Somerset Economic Strategy 2011

harbour has recently been regenerated and offers 250 berths. It is envisaged that redevelopment plans for Watchet's East Wharf will provide a mixed use development including elements of community, residential and commercial. The enhancement of Watchet's esplanade was completed in early 2008 and regular food and craft markets are held there as well as opportunity for music and events.

Williton with a population of about 3,000 is the administrative centre for the district. Whilst not a major visitor destination it acts as a gateway to the Quantock Hills and has significant potential as a hub where two of the main roads into the Exmoor area meet – the A358 from Taunton and A39 from Bridgwater.

B1.5 Surrounding areas

To the east of the Greater Exmoor area lies the District of Sedgemoor and the urban centre of Bridgwater. The proposed development of a new nuclear power station at Hinkley Point (see B7.1 below) is likely to lead to closer partnership working within this area in the future.

To the south east is the borough of Taunton Deane which includes the market town of Wiveliscombe often described as a gateway to Exmoor and particularly to the Brendon Hills.

Immediately south is the District of Mid Devon and its most northerly town, Bampton, is another known by many as a gateway to the moor. To the north and west lies North Devon which is a strong tourism brand and destination in its own right as well as encompassing parts of Exmoor. South Molton is in many ways also a gateway town to the western edges of Exmoor. The North Devon coast is designated an Area of Outstanding Natural Beauty and meets the National Park at Combe Martin whilst the area is also designated a UNESCO Biosphere Reserve. Barnstaple is the principal town offering public transport links onto the moor whilst the North Devon coast around Croyde and Woolacombe is a popular base for visitors who are attracted by the beaches of North Devon but potentially may also spend some time in the National Park.

B2. Tourism infrastructure & product

B2.1 Accommodation

There is a wide range of accommodation available within the Exmoor area with virtually all types accounted for with some excellent small hotels, guest houses, bed & breakfast establishments and camping and caravan sites. The vast majority of holiday accommodation is either self catering properties or small scale serviced accommodation providers such as bed and breakfasts or small hotels typically offering a few rooms each. There are a handful of medium sized hotels with up to around 30 rooms but there is a lack of larger scale hotel operations, with some of the larger establishments closing and changing use within the last ten years which limits the opportunity to promote the area for business tourism. Locally some businesses have worked together to host conferences of up to 100 using local facilities and spreading accommodation across a number of establishments. There is potential to develop this approach further.

Many Bed and Breakfast businesses are run as lifestyle businesses, often with owners taking early retirement and moving into the area. As a result there is a relatively high turnover of property but overall bed spaces have not altered significantly in the last 5 years. There has been some desire from owners of larger residences wishing to sell them as private homes feeling this will provide a better return than marketing the property as an ongoing business. A large number of tourism businesses outside of the main settlements are part of farm diversification projects with many now offering accommodation alongside their farming activities, as well as sometimes hosting shoots or stabling for horses and other activities. Typically about half to two thirds of the known tourism businesses are members of a local or nationally recognised quality scheme. Many self catering properties opt out in favour of schemes run by independent booking agencies whilst the evolution of user reviews, etc. has led others to review their participation in grading schemes.

In recent years camping has increased in popularity but has mainly been met through the greater use of existing sites which range from commercial caravan sites to a small backpackers field associated with a farm. There has also been a slow but steady introduction of the concept of 'glamping' to the area with the provision of ready erected tents, often offering superior facilities such as proper beds, wood heaters, etc.

Group accommodation is relatively limited. The Youth hostels Association currently operate two properties in the area: at Exford and just outside of Minehead. There are a few Local Education Authority owned centres and privately run educational centres or independently run hostels and bunk barns which provide affordable visitor accommodation. There is scope to extend this network, particularly near to the coast and long distance trails, potentially providing a new use for redundant buildings suitable for adaptation.

Given the nature of the area there has been a strong co-hort of providers seeking to offer 'green holidays'. At its height on Exmoor the Green Tourism Business Scheme had over 10 members within the National Park alone but this has since dropped. However many businesses are acting in an environmentally friendly way and are keen to market this to customers. The main visit-exmoor website offers a platform to highlight green businesses and the National Park Authority is in the process of establishing a local park charter for businesses.

B2.2 Attractions

In addition to the opportunities for informal recreation and outdoor activities the Greater Exmoor area is home to a number of more formal tourist attractions. These include the Lynton and Lynmouth cliff railway, Dunster Castle, West Somerset Railway, Lynton and Barnstaple Railway and many more. Butlins in Minehead also offers day tickets to its on site attractions and activities to non residents. There are also a myriad of local museums covering either geographical or thematic areas such as maritime, rural life, cider making, and suchlike as well as other heritage attractions such as local churches.

The vast majority of local attractions are relatively small scale with visits typically lasting less than an hour. A lack of indoor attractions in the area is a concern raised by both businesses and visitors in the area.

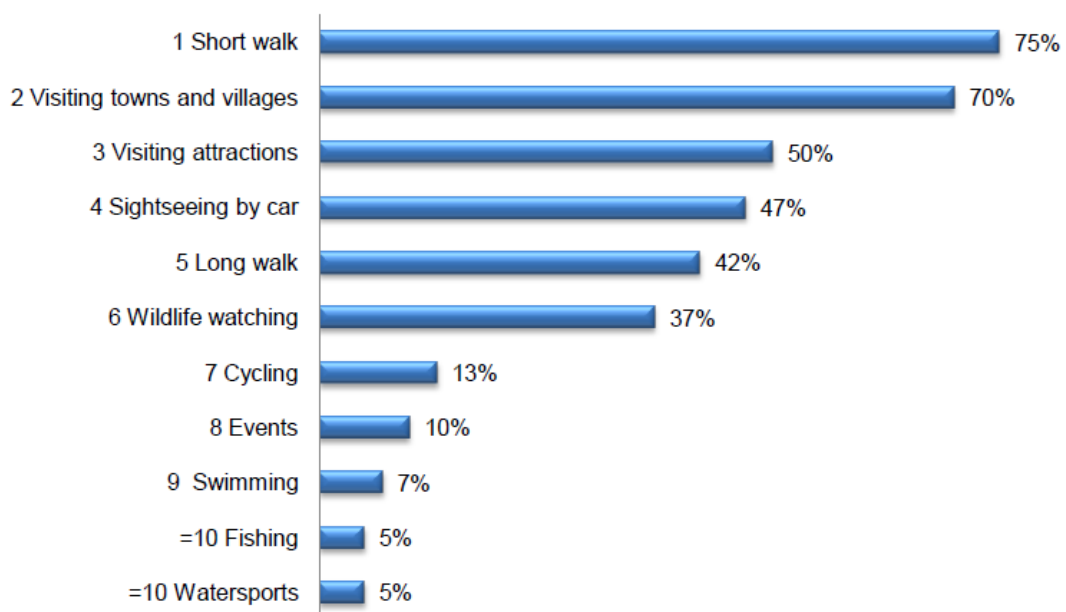
Few of the attractions wholly operate year round with many offering a reduced service or closing for a period during the low winter seasons.

In addition to permanent attractions the area boosts a strong events calendar with a range of events taking place throughout the year targeting different audiences. Whilst some, such as the Ironman which attracts over 2000 triathletes at Wimbleball, are large scale commercial activities, many others are smaller, community events run by volunteers. Previous projects have sought to help build the capacity of these event organisers. There remains a challenge in co-ordinating dates and publicising these events in a co-ordinated manner.

B2.3 Activities

The landscape is perhaps the single biggest asset for tourism in Exmoor. It offers the opportunity for a whole host of activities. Figure B7 shows the top activities undertaken by visitors to the National Park.

Figure B7: Activities undertaken by visitors to Exmoor National Park (Visitor Survey 2010)



Walking is the most popular activity and is supported by a superb Rights of Way network across the area. The National Park alone offers over 1000km of Rights of Way and scored 96% in the most recent ease of use score. There is also a large provision of open access across the area, though in reality the vast majority of walkers stick to the way marked routes.

There are a number of resources available on and off line offering self guided walking routes including free and paid for publications providing visitors the opportunity to follow a set route and to gain some background information to points of interest along the route. There are a number of all ability routes that are accessible by wheelchair, tramper and pushchairs

– for example the Tall Trees Trail in the Crown Estates Dunster Forest which takes in the tallest tree in England.

Whilst longer walks are less popular they still attract a large number of people. Many of these will be competent walkers who will enjoy creating their own routes. Others prefer a challenge and Exmoor is host to 4 way marked long distance trails including the South West Coast Path (rated by Lonely Planet as one of world's greatest walks) which starts its 630 mile route in Minehead traversing the entire length of the National Park Coastline en-route to its finish in Poole. Other way marked routes include the Coleridge Way which links the Quantock Hills AONB and the National Park together, the Two Moors Way linking to Dartmoor National Park in southern Devon, and the Tarka Trail.

These 'promoted routes' have been shown to encourage visitors and benefit businesses, for example 72% of businesses reported they had received some significant benefit as a direct result of the Coleridge Way and 65% of accommodation providers in the small villages along the route had repeat visitors as a direct result of the Coleridge Way¹¹

Not all recreation is active and general **sightseeing** is a very popular activity on Exmoor with around 47% of visitors participating¹². Taking in the view whilst travelling or at a view point, sitting and enjoying an outdoor picnic with family and friends, visiting historic settlements and features of interest remain popular activities alongside shopping and there is anecdotal evidence of both increased and decreased visitor numbers in some locations. Road sign information, informal and formal parking spots, toilet facilities, refreshments and information provide important support for these activities.

Road Cycling on Exmoor is more limited than some areas given the steepness of the hills. However it remains a relatively popular activity and there are a number of hire outlets across the area. There are no dedicated long distance cycle paths in the area and the creation of a permanent dedicated cycle track – the Steam Coast Trail - from Minehead, linking in towns such as Watchet and Williton, is a long term aspiration. However the Sustrans network links the area – particularly through the West Country Way national route which travels across the National Park and much of the Exmoor areas as well as regional routes including the North Devon Cycle route.

For keen road cyclists the Exmoor Cycle Route was established in 2008 following the original Tour of Britain route across Exmoor. At 70 miles with a number of steep gradients including both Porlock and Lynmouth Hills it is a very challenging day ride.

More recently there have been some formative attempts to establish electric bikes on Exmoor both by private sector companies and the Exmoor Unplugged project. These take the sting out of the hills but even with a network of charging points it is not possible to undertake a long day ride over hilly terrain ride without the expense of a second battery.

Mountain Biking is an increasingly popular activity both across the UK and within Exmoor. The Quantock Hills AONB and National Park collectively offer some of the best single track

¹¹ Coleridge Way Economic Impact Survey (2005) ENPA

¹² Exmoor Visitor Survey, 2010, ENPA

riding in the country. Unlike many other destinations much of this is based on general tracks as opposed to purpose built courses and offers the added challenge of route planning and navigation to experienced riders. The 1 South West cycle project has received RDPE funding to develop the South West's mountain biking offer and has provided interactive maps including grading, ratings and other user information for all off road tracks in the protected areas. The project has also funded a cycle path improvement project at Wimbleball Lake. The National Park Authority has published an off road map for cyclists using the Cycle touring clubs nationally recognised colour gradings to mark tracks ranging from green (easy) to black (very challenging).

Horse Riding is a traditional activity still enjoyed by many across Exmoor. Within the National Park 60% of the extensive Rights of Way network is bridleway status or above. A number of businesses offer stabling for those wishing to bring their own horses whilst there are also a number of schools and trekking centres offering tuition and hire.

Water sports are relatively limited on Exmoor but still economically important. The only flat inland water in the area available to the public for watersports is Wimbleball reservoir in the Brendon Hills. Managed by the South West Lakes Trust, this offers tuition, equipment hire and launching for non-powered activities including sailing, windsurfing, canoeing and rowing.

In the winter period canoeing on Exmoor's rivers is popular with both local and visiting groups and individuals. There is no general permission to canoe Exmoor's non tidal inland rivers but permissive winter access arrangements exist on the Barle and the East Lyn. The River Barle offers opportunities for canoeists of various skill levels whereas the East Lyn offers a high grade challenge only for the more experienced. There has been ongoing concern raised by some anglers and fishery/riparian owners regarding canoe access on the Barle and on the East Lyn. This is being addressed by a number of interested parties working in partnership with the National Park Authority and the Exmoor Local Access Forum.

Exmoor is synonymous with **Countryside sports** including shooting, hunting and fishing. These can be big earners for the local tourism sector, particularly in the shoulder and off seasons.

Exmoor offers stocked **fishing** at places like Wimbleball, Coastal fishing and salmon and trout fishing along its inland rivers.

Traditionally, Exmoor and the Quantocks have been key venues for **fox hunting** and the centre in the UK for **stag hunting**. Seven hunts are based in and around the National Park and all are actively supported. While the hunts continue to meet regularly, they have had to adapt to the requirements of the Hunting Act 2004. Despite these changes, fields are still large, particularly for the stag hunts. While hunting continues to make a significant contribution to the local economy, a study by Primer International in 2009 estimated that the direct and indirect economic contribution in the Greater Exmoor area from stag hunting had fallen from around £9.5m per year in 2003 to less than £3 million in 2009¹³.

¹³ Study into the Economic Impact of Red Deer on Exmoor, Promar International, 2009

Pheasant and partridge **shoots** have grown considerably over the last 10-15 years and are estimated to support more than 16,000 visitor nights in the Greater Exmoor area during the 2004/05 season¹⁴. This provides an important contribution to the local economy at this time of year (mid September to end of January) and supports the provision of high quality accommodation.

Until recently many organised countryside sports events have been relatively closed events but the RDPE funded Countryside Sports South West project is seeking to overcome this and make events more accessible to new visitors and beginners to broaden the appeal whilst offering products such as the West Country Fish passport to make private beats more easily accessible to visitors.

A handful of businesses offer guided experiences including **outdoor activity instruction** such as mountain biking, climbing and coasteering as well as **safari experiences**, using off road vehicle to provide visitors with a greater chance of close encounters to wildlife such as the Red deer and Exmoor ponies.

More recently the designation of Exmoor as a Dark Sky Reserve has led to anecdotal reports of an increase in **stargazing**. This is being tested in the current visitor survey being conducted.

Traditionally the development of activity holidays on Exmoor has been slower compared to other UK National Parks. However initiatives such as the Active Exmoor project have helped to put Exmoor on the map for active recreational opportunities.

All activity across the area should be developed to minimise conflict, and ensure that sustainable development principles are embraced in order to safeguard the assets for future generations and for healthy long term economic growth.

B2.4 Food and drink

Food and Drink is becoming an increasingly important part of the holiday experience¹⁵. Exmoor offers an ideal opportunity for people to be able to sample local food and drink and to make the connection between a well managed natural environment and quality food. This has been demonstrated by the establishment of the Exmoor Horn Sheep meat brand. Exmoor Horn sheep are a native species to the area and are ideally suited to managing the landscape in a low impact manner. The establishment of a specific Horn sheep brand afforded the opportunity to demonstrate the meat's quality characteristics and charge a premium price. At present whilst some producers use Exmoor as a selling point when branding their projects there is no official food brand for the area.

Support and co-ordination for local food work is limited. Somerset Food links operated across the Exmoor area until 2008 and there is now something of a void, particularly in Somerset. North Devon+ continues to promote local food businesses in a mini guide and

¹⁴ The Role of Game Shooting in Exmoor (2006) PACEC

¹⁵ Hidden Britain, Autumn 2012 Newsletter

organise annual food and drink awards. A recent funding bid has been successful to develop a more co-ordinated approach to local food work in Western Somerset. Whilst detailed public information is limited this is more than supplemented by the local knowledge often offered by hosts to their guests.

A survey conducted for the Exmoor Foodlinks Project found that of those businesses offering local produce many weren't actively using this as a marketing tool or promoting the use of local produce within menus.

B2.5 Cultural heritage

Cultural heritage can carry a plethora of meanings; in this instance it is used to cover the historic environment assets of the area as well as links to the arts and literature.

Man has occupied the area for over 8,000 years and throughout the area you can trace evidence of this interaction including burial mounds, standing stones, roman forts, medieval buildings and villages such as Dunster, and Victorian engineering projects (such as the old Mineral Line running across the Brendon Hills to the sea at Watchet, which has recently been enhanced through a Heritage Lottery Funded programme.)

The history of Exmoor is one long story of how people from Mesolithic times to the present day have tried in different ways to live on and around the moor and exploit the area for their own purposes. For example, they hunted and fished, cut down trees, built houses, cleared and cultivated land, grazed animals. They also traded, travelled, worshipped, and buried their dead. In doing these things they left behind traces of their activities such as flint arrowheads and standing stones, deserted mine-shafts and derelict buildings. At the same time their actions helped form the Exmoor landscape as we know it. Trees were gradually cleared from the hills and later vegetation was controlled so that sheep could find the best grazing.

The whole Exmoor landscape is a record of how people lived there in the past. It is a particularly important landscape historically because there are so many undisturbed archaeological sites and monuments and probably more to be discovered.

The Exmoor area has particularly strong links to the romantic writers, poets and artists. Wordsworth, Coleridge, Soothe, Hazlitt, Kingsley, Lovelace and Shelley all spent time in the area whilst R D Blakemore's novel Lorna Doone is based on Exmoor as is Henry Williamson's Tarka the Otter. The early 20th century saw the birth of Hope Bourne who was perhaps more known for her simplistic lifestyle on Exmoor living off the land, than her countryside writings, and science fiction author Arthur C Clarke was born in Minehead.

The area has been used as a film location, though disappointingly not for TV adaptations of local classics such as Lorna Doone which was instead shot in the Brecon Beacons.

It was the romantics that helped place Exmoor on the map as a tourist destination and just as tourism has remained today the arts are well truly alive on Exmoor from local craftsman turning wood produced in the area to landscape artist, photographers, storytellers and

more. There are many art events in local communities and each year both Somerset and Devon hold open art weeks when private studios are open to the public.

B2.6 Information provision

Providing relevant and accurate information to visitors is crucial to maximising their satisfaction and encouraging greater local distinctiveness and longer visitor dwell times.

There are a number of information centres of different sorts operating across the area with different funding models. Some are commercial concerns, others run by community groups whilst some are provided by the public sector. Funding is a critical issue in the current climate, as is their mode of operating given increased use of the internet via smart phones and tablets for information on the move. North Devon+ is currently conducting research into future options and this will be added to by work in Somerset through an interreg funded project – COOL tourism.

The National Park Authority currently operates 3 National Park Centres at Dulverton, Dunster and Lynmouth. These are not official TICs and do not offer accommodation bookings. Instead they are designed to deliver the Authority's purpose of promoting understanding and enjoyment of the area's special qualities. The centre at Lynmouth is currently hosted in a portacabin prior to the imminent redevelopment of the Pavilion as a flagship centre to open in spring 2013. This will offer a significant opportunity to offer new information in new interactive and engaging ways. In smaller settlements the Authority supports the provision of Local Information Points hosted by existing facilities such as village shops or pubs.

There are community run centres in Combe Martin, South Molton, Watchet, Porlock and a new centre in Minehead run by the Minehead Development Trust, many of which receive some form of public sector funding support at present. There is also a commercially run TIC in Lynton. Many visitor attractions also provide visitor information including National Trust properties such as Fyne Court on the Quantocks.

Three annual brochures are currently produced for the area by West Somerset Council, Somerset Tourist Association and North Devon+. The latter two target areas which incorporate parts of Exmoor to the west and east respectively within wider areas. As a form of marketing the value gained vs. the costs of production and distribution are continuously being looked at and it is likely that new approaches will need to be found in the future. The coherent Visit Exmoor website is being developed as a mobile site and an APP has been produced for Minehead and other destinations are likely to follow suit. The use of apps and modern technology is somewhat limited by the poor reception and slow speeds experienced in many parts of Exmoor.

It appears that paper based publications still have a role to play once visitors have arrived in the area and the National Park Authority produces an annual Exmoor Visitor publication listing local events and things to do as well as Pocket Guides to the National Park and Dark Sky Reserve.

B2.7 Transport & Communications

Exmoor is remote and this is part of its attraction to current visitors. The National Park is one of the least accessible in England with no rail connections and some 20 miles from the nearest dual carriageway / motorway links. In addition the surrounding population is relatively modest compared to many other National Parks

Well over 90% of visitors arrive by private car. The main routes being: the A39 from the M5 at Bridgwater to Minehead and along the Exmoor coast, linking with the North Devon Link road from the M5 at Tiverton; the A358 from Taunton to Minehead and the A396 linking with the North Devon Link road at Tiverton and crossing the National Park to Minehead. There is no dual carriage way and in the event of accidents, special events or roadworks diversions can be significant creating long journey delays. The proposed construction of a new power station at Hinkley point is likely to add to congestion on the eastern approaches to the area.

Whilst it isn't straight forward it is quite possible to reach the area by public transport. Coaches and trains operate direct to Taunton, Tiverton and Barnstaple where onward bus connections link with the National Park and the West Somerset Railway provides a link from Bishops Lydeard a few miles out from Taunton to Minehead, connecting towns such as Watchet and Williton.

Local bus services currently serve the majority, but not all, villages and settlements whilst the MoorRover is an innovative demand response scheme operating within the National Park for leisure use where standard services don't exist. It is operated by a community transport organisation. Such transport however is currently under constant threat as government grants and subsidies are removed in the deficit reduction programme. The Exmoor National Park Authority has created the Explore Moor website to provide a one stop shop for visitors for information, inspiration and ideas of how to get to / from and around the area by public transport making use of an interactive map, itineraries and a range of self guided car free walks.

Levels of traffic on Exmoor's roads are considerably less than in other National Parks, and in much of the National Park current traffic levels can be tolerated, even in summer. However, there are areas where problems of congestion occur, particularly in popular locations such as Dunster, Lynton & Lynmouth, Dulverton and Porlock. Some of Exmoor's roads, and some of the roads leading up to its boundaries, are not suitable for the levels of traffic now being experienced. The effects of traffic on the environment include over-demand for parking spaces, intrusion of parked vehicles into the landscape of the open areas, heavy goods vehicles using inappropriate roads, and excessive speeds in some villages and on some open roads

Opportunities do exist to increase accessibility by public transport, including potential plans to provide a permanent link to Taunton and the national rail network, via the West Somerset Railway, the potential of bus services linked to the Exeter to Barnstaple rail line and the possibility of a ferry link to South Wales. However no funding has yet been sourced for any of these aspirations.

Communications have improved but are still lagging behind many other parts of the country. Broadband is still very slow in many parts of Exmoor, and in some remote places unavailable whilst mobile phone coverage is at best patchy with only one or two operators providing any significant cover in the rural areas, and even more limited access to 3g services. Such communication channels are important to both businesses who need such facilities to operate efficiently and to visitors who expect and want to be able to access services such as BBC player whilst away and visitor information.

Despite some perceptions this lack of communication infrastructure is more often a result of limited business returns for providers than issues surrounding the designation of protected landscapes. The National Park Authority has been very pro-active – for example successfully approaching Orange to provide a mast giving mobile coverage to Lynton and Lynmouth and recently successfully submitting a stage 1 bid to Defra's Rural Community Broadband Fund to work in partnership with the Connecting Devon and Somerset project to ensure even the most remote properties on Exmoor have access to super fast broadband.

B2.8 Visitor facilities

Most visitors to Exmoor, according to surveys, come for quiet and informal recreation and do not require the same specialised facilities as more organised pursuits. Promoting the enjoyment of Exmoor's special qualities does, however, require the provision of basic facilities to help people enjoy their stay and to assist in the protection of the environment in areas of tourism pressure.

Traditionally the National Park Authority, local councils, The National Trust and others, have provided and maintained such facilities, so that today the area is well provided with car parks, picnic sites, toilets and other facilities. The current economic climate and related cuts in government spending will provide a challenge in maintaining these facilities.

The 2010 Exmoor Visitor Survey indicated that 78% of visitors thought the number of public toilets was about right, with 22% saying there were too few. 74% of visitors thought public toilet cleanliness was good or very good. However, there is a strong demand to maintain services at the current level, against a backdrop of closures stemming from the current squeeze on public finances.

The 2010 Exmoor Visitor Survey shows a strong (65%) view that the availability of equipment hire for outdoor activities within the National Park is too low. As demand for outdoor activities continues to rise this may provide an emerging opportunity for a local business.

Road signage and basic information is important to enable visitors to seek out key places of interest. The 2010 Exmoor Visitor Survey indicated that 74% of people find it easy to get around by road, with 23% finding it fair.

B2.9 People

The whole of Exmoor's community is affected in some way by tourism, whether benefiting from the income, employment and services that tourism brings or by occasional adverse effects. Many farmers have turned to tourism to supplement income from agriculture.

In Greater Exmoor it is estimated that tourism supports the equivalent of over 4,350 full time jobs. Within the National Park this accounts for the largest sector of employment, especially when combined with retail and other service activities which are often largely dependent upon tourism.

The tourism industry is often associated with low income and highly seasonal employment. However, it is evident that many people on Exmoor make a reasonable living from tourism, particularly if they own or manage a tourism enterprise or if a tourism business supports their other economic activity. A study by the New Economics Foundation published in 2007¹⁶ has indicated ways in which the economic contribution from recreation and tourism can be further enhanced and have increased benefits to other parts of the Exmoor economy.

B3. Volume and value of tourism

Annual research by Global Tourism Solutions (UK) Ltd, using the STEAM methodology (see figure B8) estimated that the Greater Exmoor area received approximately 4.62 million visitor days in 2011 contributing over £225 million to the economy each year.

Figure B8: Volume and Value of Tourism to Greater Exmoor and Exmoor National Park

		2004	2005	2006	2007	2008	2009	2010	2011
Visitor days	Exmoor National Park	1.97m	2.00m	2.13m	2.08m	1.99m	2.02m	2.03m	2.02m
	Greater Exmoor	4.40m	4.51m	4.65m	4.79m	4.42m	4.55m	4.66m	4.62m
Visitor spend	Exmoor National Park	£71.2m	£74.2m	£81.9m	£83.1m	£83.5m	£85.2m	£89.2m	£92.9m
	Greater Exmoor	£178m	£180m	£190m	£204m	£197m	£203m	£216m	£226m

** Data provided by Global Tourism Solutions (UK) Ltd using the Scarborough Tourism Economic Activity Monitor (STEAM) methodology as summarised in Exmoor National Park Authority State of Tourism report 2011.*

Within the National Park it is estimated that there were 2.02m visitor days with an economic value of over £90m. Directly comparable data in isolation for the Quantock Hills is not available but in 2003 it was estimated that the area received 385,000 recreational visits a

¹⁶ Greater Exmoor Sustainable Economic Development Strategy, New Economics Foundation, 2007

year with 75% of these being part of a day trip and 73% of visitors living locally within Somerset¹⁷.

Consistent and reliable data on trends in visitor numbers to Greater Exmoor has been collated since 2004 using the STEAM methodology. Overall the results indicate a small growth in visitor numbers, although this is not always reflected evenly across destinations within the area or all sectors of tourism. Anecdotally some businesses report a significant reduction in visitor numbers overall since the early 80's but in some 'honey pot' visitor locations such as Tarr Steps and Landacre Bridge landowners report that visitor numbers have increased over the last three decades.

The picture is further complicated by the changes in types of outdoor recreation and changing visitor trends. Whilst it would be interesting to monitor visitor numbers in more detail, this is not easy to do and the impact of recreation, which can be monitored more effectively, is arguably more important than total numbers of visitors.

The pattern of visits is changing and long-stay holidays are decreasing while short-stay breaks and activity holidays are becoming the norm. Many trips to Exmoor are now booked at the last minute, sometimes taking advantage of discounted prices. There is in general lower demand for hotel, guest house and bed & breakfast (serviced) accommodation but camping, caravan and self-catering holidays (non serviced) appear to be increasing in popularity, although it is too early to tell if this is a long term trend or a short term response to the current financial climate.

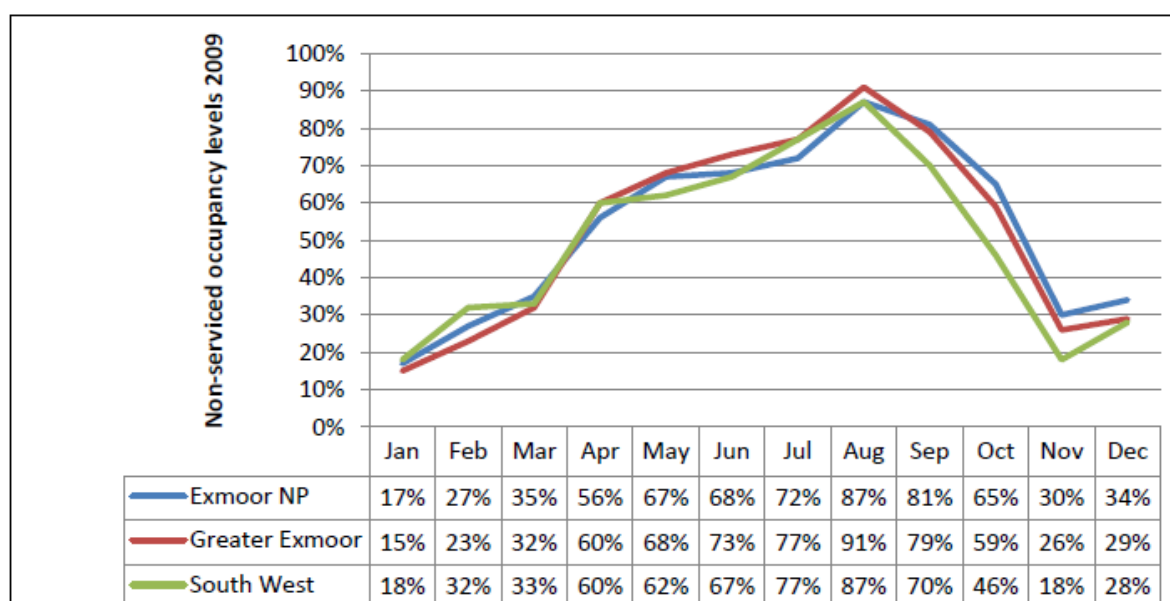
Whilst for Greater Exmoor there has been an overall increase in visitor numbers between 2005 and 2011 of 5%, value has risen by 25%. However much of this will be down to inflation. If prices are index linked to 2011 prices we see an increase of 8% from £209.92m in 2005 to £226m in 2011. In real terms, allowing for inflation the average estimated spend per visitor day has risen by £2.33 from £46.55 to £48.88 per visitor day.

The pattern of tourism has changed in recent years and there has been an increase in the length of the tourism season in some types of tourism. Extending the tourism season outside the April to October period helps to provide more permanent jobs. This requires improved accommodation to cater for guests in wet weather, keeping attractions open all year and marketing the qualities of Exmoor. Qualities such as tranquillity, dark skies and wildness can often be enjoyed in winter and the recent designation of Exmoor as an International Dark Sky Reserve has been welcomed by the tourism industry as an opportunity to further promote the off season for stargazing opportunities alongside traditional out of season activities such as deer watching and countryside sports.

Figures B9 & 10 show the occupancy levels typically experienced in the area, while figure B11 demonstrates that despite spare capacity, even at peak times (especially for serviced accommodation) many businesses prefer not to run at 100% capacity all the time to allow for maintenance, breaks and holidays – particularly those run as more of a lifestyle than career choice.

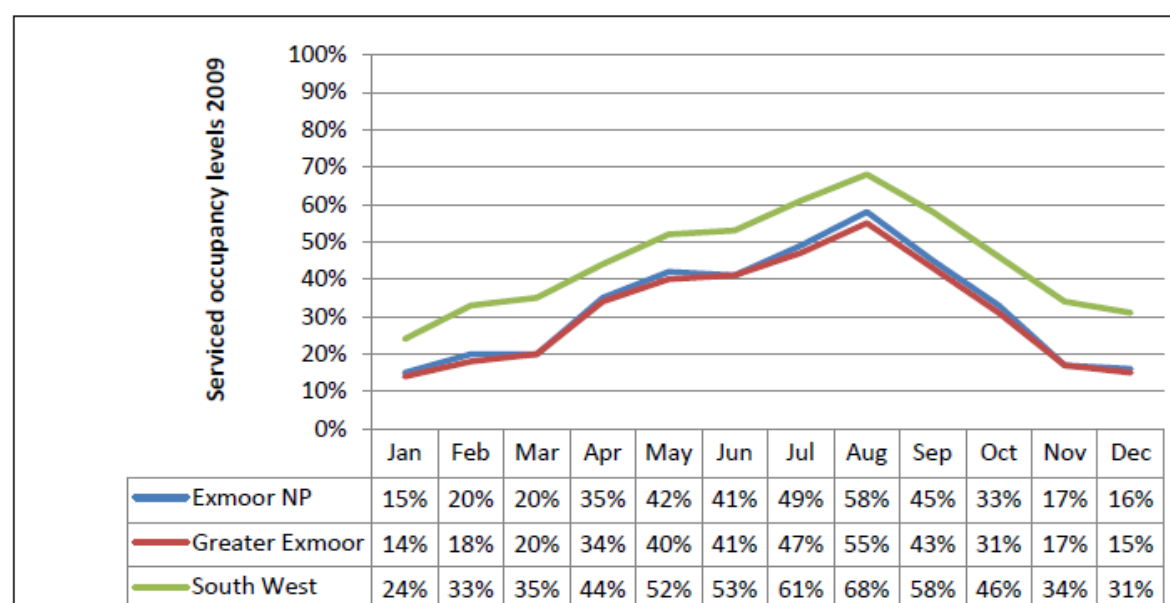
¹⁷ Quantock Hills AONB Visitor Survey 2003, as reported in 2009-2014 Management Plan

Figure B9 – Non serviced occupancy levels for Exmoor National Park, Greater Exmoor and the South West



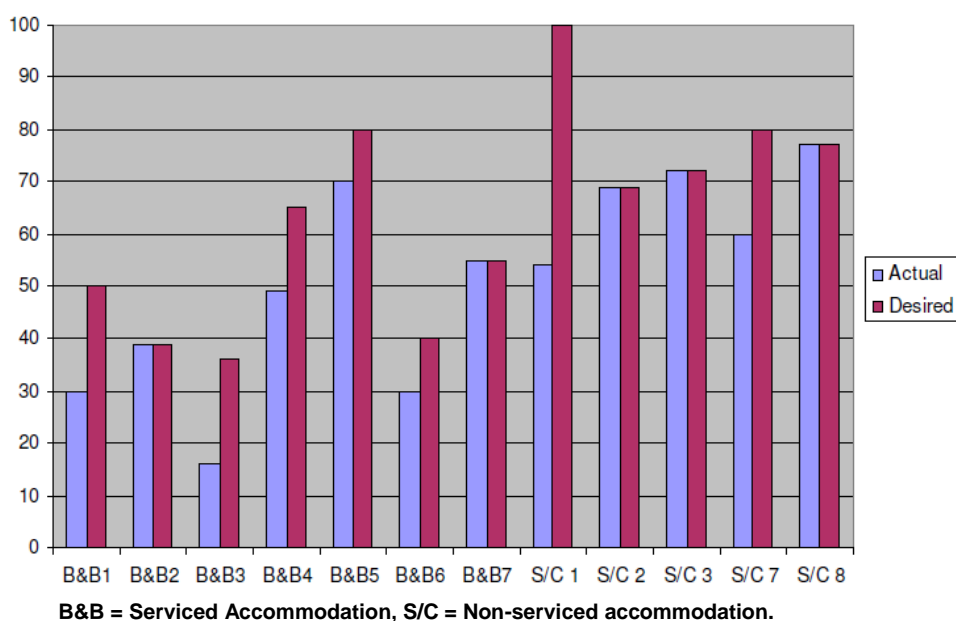
Source GTS (UK) Ltd, 2009 & South West Tourism. Please note the South West data does not include Devon.

Figure B10 – Serviced occupancy levels for Exmoor National Park, Greater Exmoor and the South West.



Source GTS (UK) Ltd, 2009 & South West Tourism.

Figure B11 – A comparison of actual occupancy levels with desired occupancy for 12 accommodation providers in Exmoor National Park.



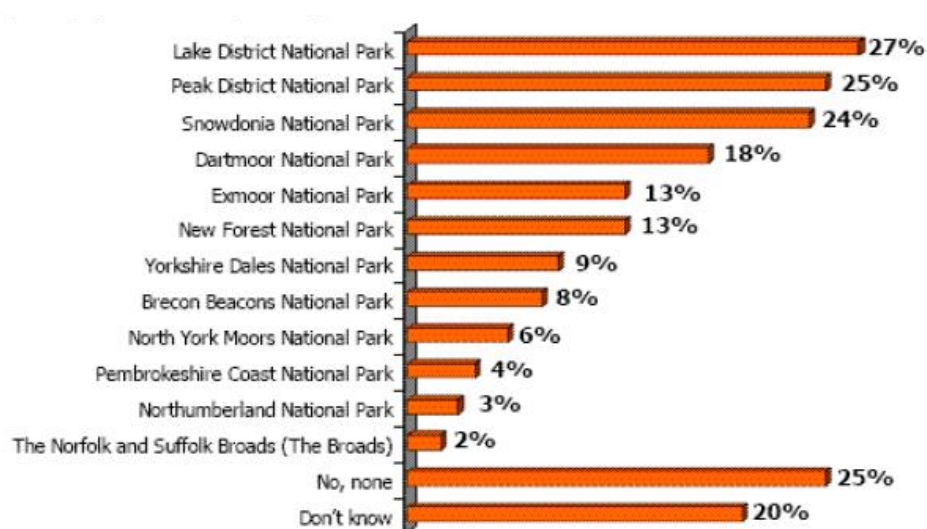
More detailed information on the volume and value of tourism to the area can be found in the ENPA State of Tourism reports.

B4. Visitor views & awareness

B4.1 Awareness

In comparison to other National Parks awareness of Exmoor is relatively high, as shown in figure B12.

Figure B12: Public awareness of National Parks in England and Wales (unprompted) (GfK NOP 2007)



In 2012 the National Park Authority commissioned Exeter University to conduct a non-visitor survey exploring the countryside visiting habits of people within the main M4 and M5

corridor catchment area for Exmoor. 85% of respondents had heard of Exmoor and of the remaining 15% almost half (42%) hadn't visited any National Park in the last 5 years indicating they are potentially not interested in the product on offer.

B4.2 Visitor satisfaction and profile

Visitor satisfaction is high with 99% of respondents to the 2010 visitor survey stating their overall satisfaction of the National Park as a destination being 'very good' or 'good'. This is likely to be behind the motivation for a high level (80%) of repeat visits.

Visitor surveys conducted in 2005 and 2010 indicate a significant decrease in the proportion of visitors to the National Park aged under 45 compared with data from the 1980's (See figure B13). Attracting younger visitors may require greater provision of packaged activities, promotion of more adventurous activities, increased value for money and adaptation of new technology.

Figure B13: Age profile of visitors to Exmoor National Park (Exmoor Visitor Surveys)

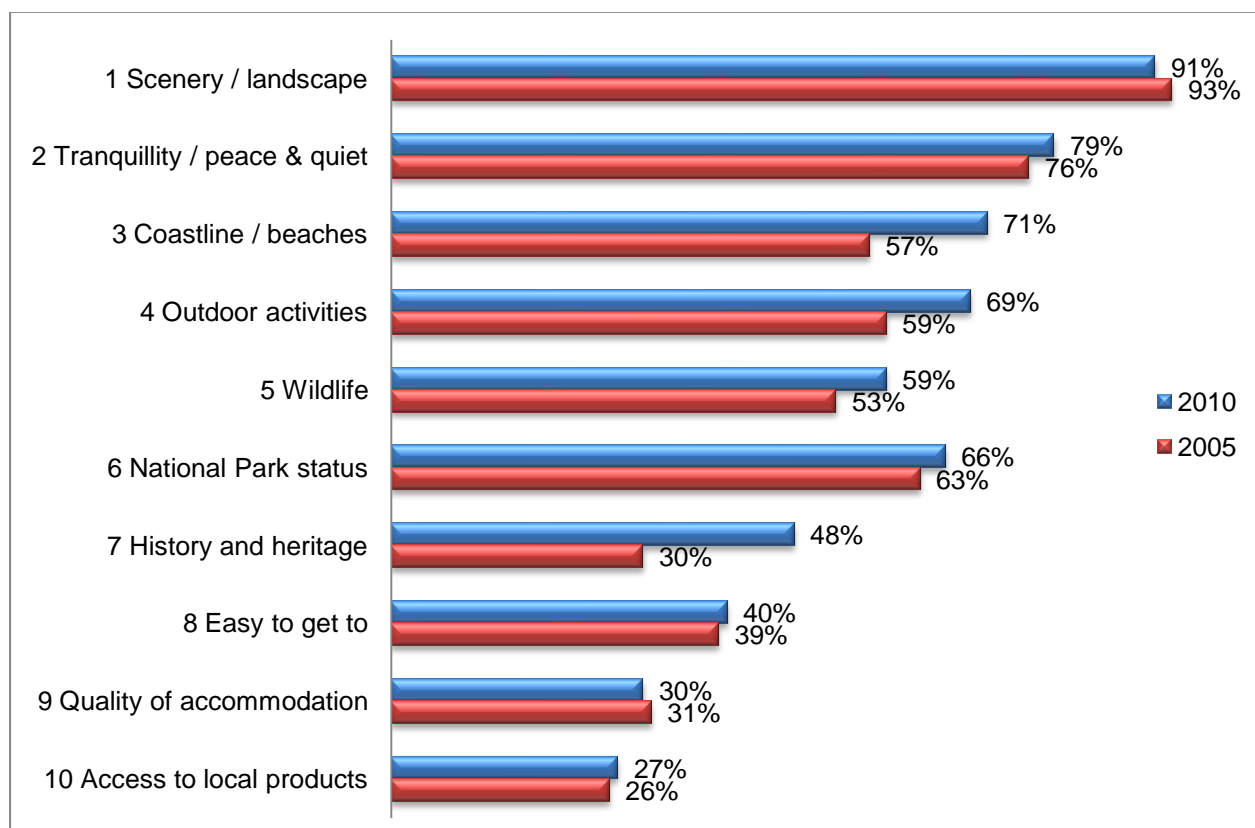
Age	1980	1981	1982	1983	1987	2005	2010
15/16-24 years*	4	10	10	10	9	6	5
25-44 years	40	37	53	42	48	26	27
45-64 years	42	33	26	34	31	45	47
65+ years	14	20	11	14	12	23	21

*Surveys in the 1980s counted ages 15 to 24 while the 2005 & 2010 surveys referred to under 15s and 16-17 etc.

The primary attractors to the National Park as a tourism destination have remained relatively stable between 2005 and 2010 as indicated in figure B14. Notable movements are the increase in people citing outdoor activities, the coastline, history and heritage and wildlife as primary reasons for visiting Exmoor.

The National Park brand, one that is internationally known, adds significant value to the attractors of Exmoor. 66% cite National Park designation as a primary reason for their visit, with 93% being aware of the area's designation before visiting.

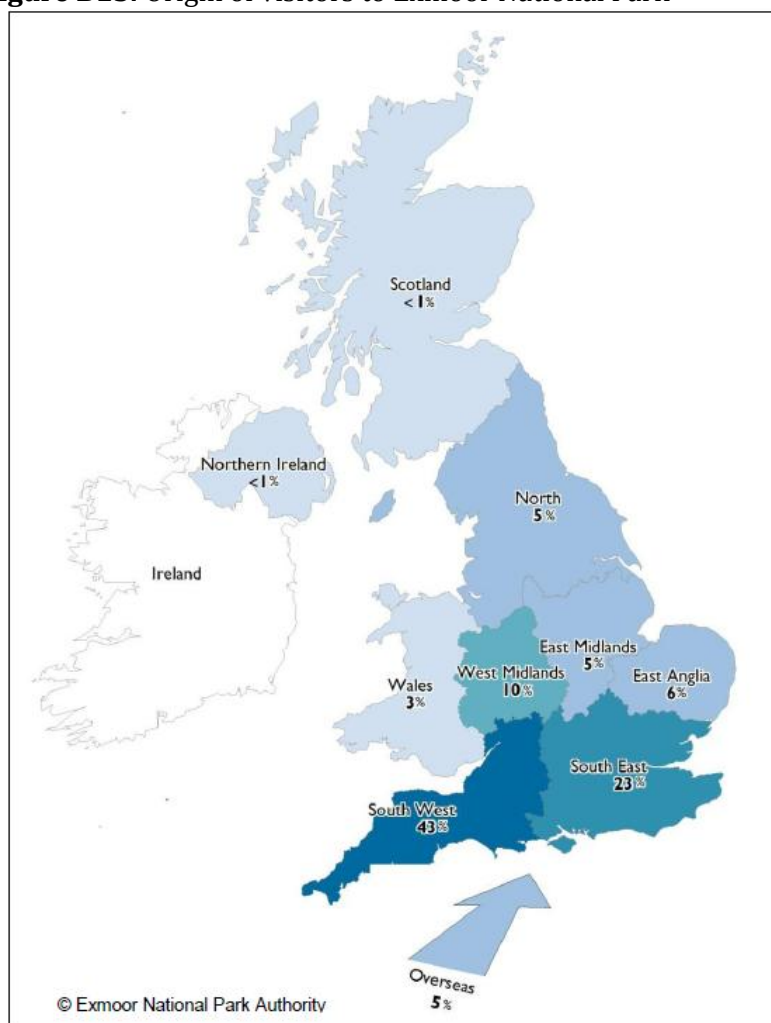
Figure B14: Primary attractors to Exmoor National Park as a tourism destination 2005 & 2010.



The majority of visitors come from within the region or from neighbouring regions, primarily along the M4 and M5 motorway corridors (see figure B15). 5% of visitors come from overseas and anecdotal evidence suggests this may have risen since the last survey was conducted in 2010.

More detailed information on visitor views and opinions can be found in the ENPA State of Tourism reports.

Figure B15: Origin of visitors to Exmoor National Park



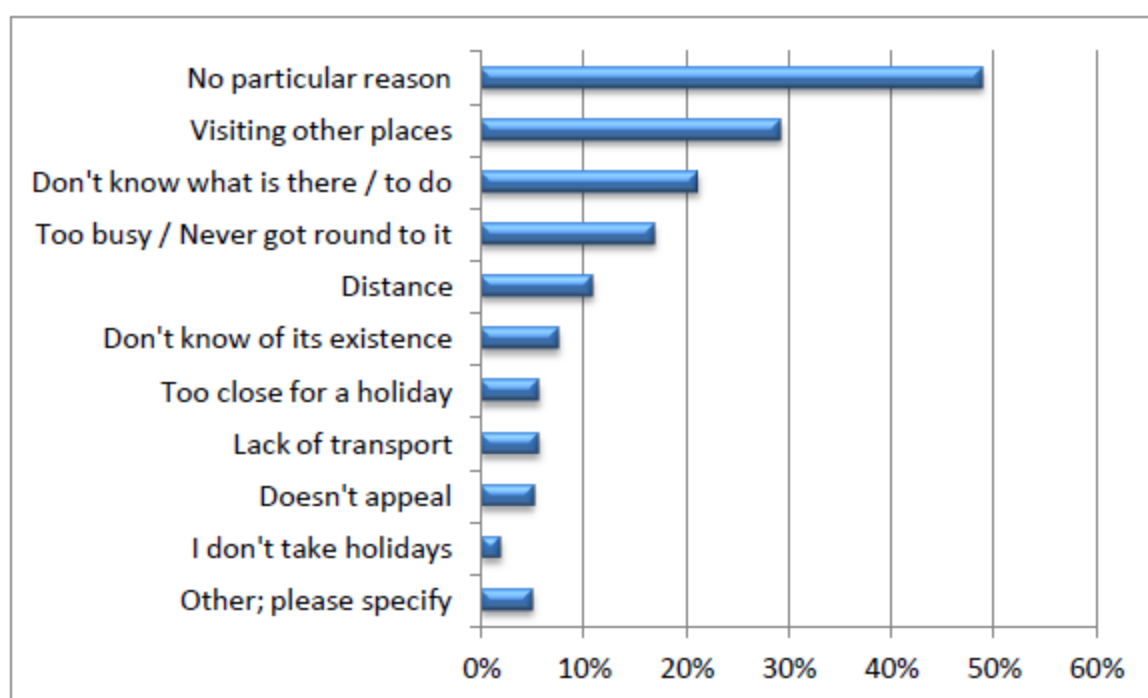
B4.3 Non visitors views

Non-visitors within the main catchment areas for Exmoor were asked 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 B16)¹⁸. 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 are likely to have been influenced by the chosen survey sites within relative proximity to Exmoor.

More information on non-visitor views can be found in the Exmoor National Park Non-Visitor survey 2012.

¹⁸ Exmoor National Park non-visitor survey 2012, ENPA,

Figure B16: Reasons for not visiting Exmoor (ENPA non visitor survey 2012)



B5. Business views, requirements and objectives

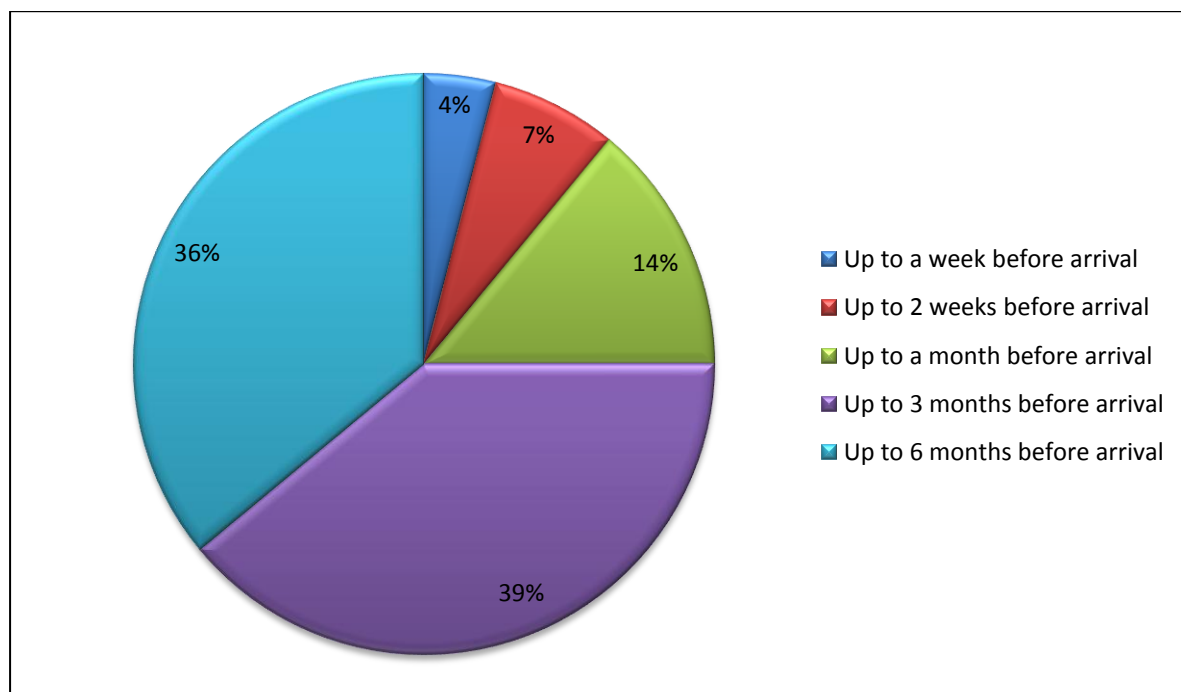
A diverse range of individual businesses make up the industry in the area. The majority are members of at least one, and in some cases several, local trade associations as shown in figure B17.

Figure B17: Membership of local trade associations

	2010	2011
Exmoor Tourist Association	66%	59%
North Devon +	31%	31%
Lynmouth Association for Commerce and Tourism	19%	9%
Porlock Tourist Association	17%	6%
Exmoor Holiday Group	15%	6%
Somerset Tourist Association	14%	9%
Exmoor to Sea (attractions)	5%	6%
Dunster Chamber of Commerce	3%	3%
Minehead Hoteliers Association	3%	0%
Combe Martin Tourism Association	3%	3%
South Molton Tourism Association	3%	3%
Other* <i>Other included: WACET, North Devon Farm holiday Group, Museums in Somerset, Lyn TIC.</i>	8%	15%

Accommodation providers report that advanced bookings are coming much later in recent years than previously, with the majority (54%) of bookings being made between 1 week and 3 months of arrival (see figure B18).

Figure B18: Advanced accommodation bookings



Marketing tends to be one of the highest priorities for local businesses – both as an activity to complete themselves and as a core role they believe local support organisations should take.

Figure B19 shows the marketing priorities that businesses view support bodies should focus on in order of importance. This information, together with data on trends and visitor views, helps the Exmoor Tourism Partnership to develop its 3 year marketing strategy and corresponding annual marketing plans.

Figure B20 shows the relative importance placed on different individual marketing channels by local providers depicting the percentage of businesses that rate individual initiatives as either 'important' or 'very important'.

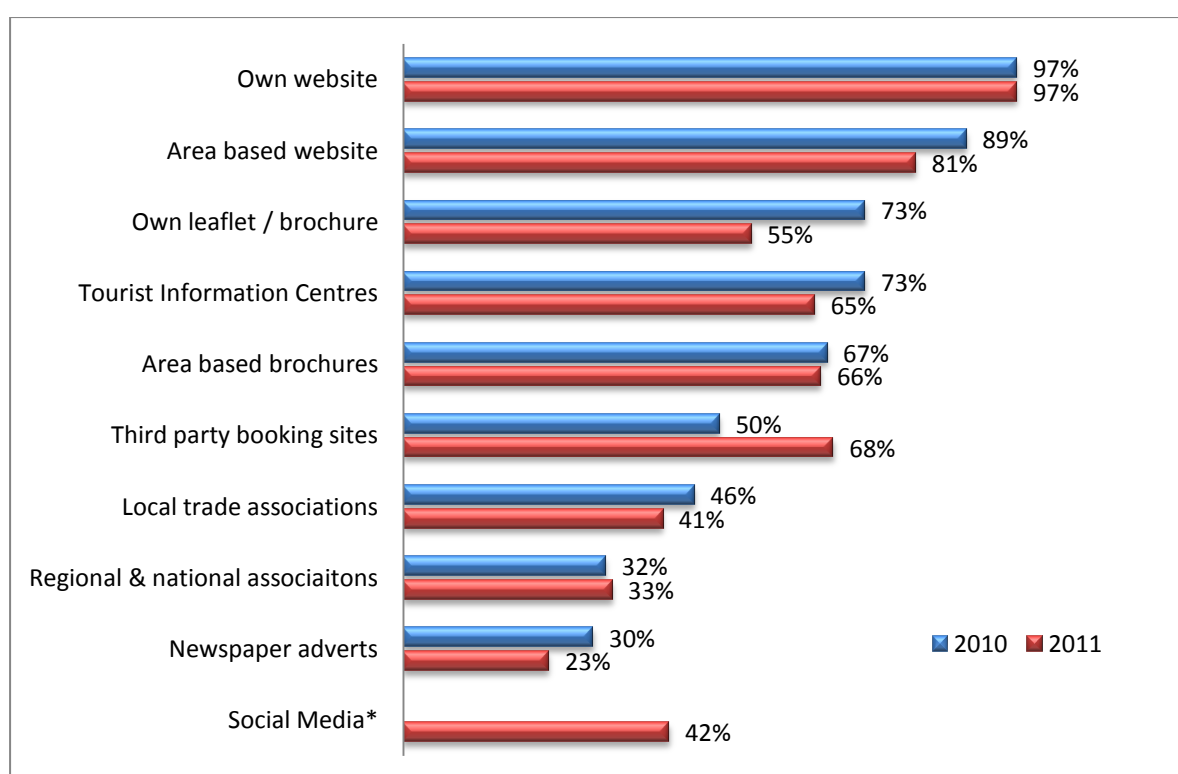
Online marketing is the most popular vehicle for businesses, although some continue to see the benefits of more traditional paper forms of marketing approaches such as leaflets and brochures.

The ENPA Business Survey (2011) saw respondents from across the Greater Exmoor area with just under two thirds (63%) located actually within the National Park. Despite this 78% felt that the National Park designation was important to their business, whilst 90% use the special qualities (see figure B2 earlier) within their marketing materials.

Figure B19: Priority of area marketing options (ENPA Business survey 2011)

	Mean score (1= most important, 10= least)	Rank
Area website (e.g. Visit Exmoor)	3.22	1
Articles in magazines and papers	4.19	2
Area brochure	4.42	3
Online articles	5.08	4
Social media (e.g. Twitter, Facebook etc)	5.56	5
Adverts in specialist press	5.61	6
Adverts in national press	6.06	7
Trade shows and exhibitions	6.36	8
Adverts in regional press	6.94	9
Sponsorship of events	7.56	10

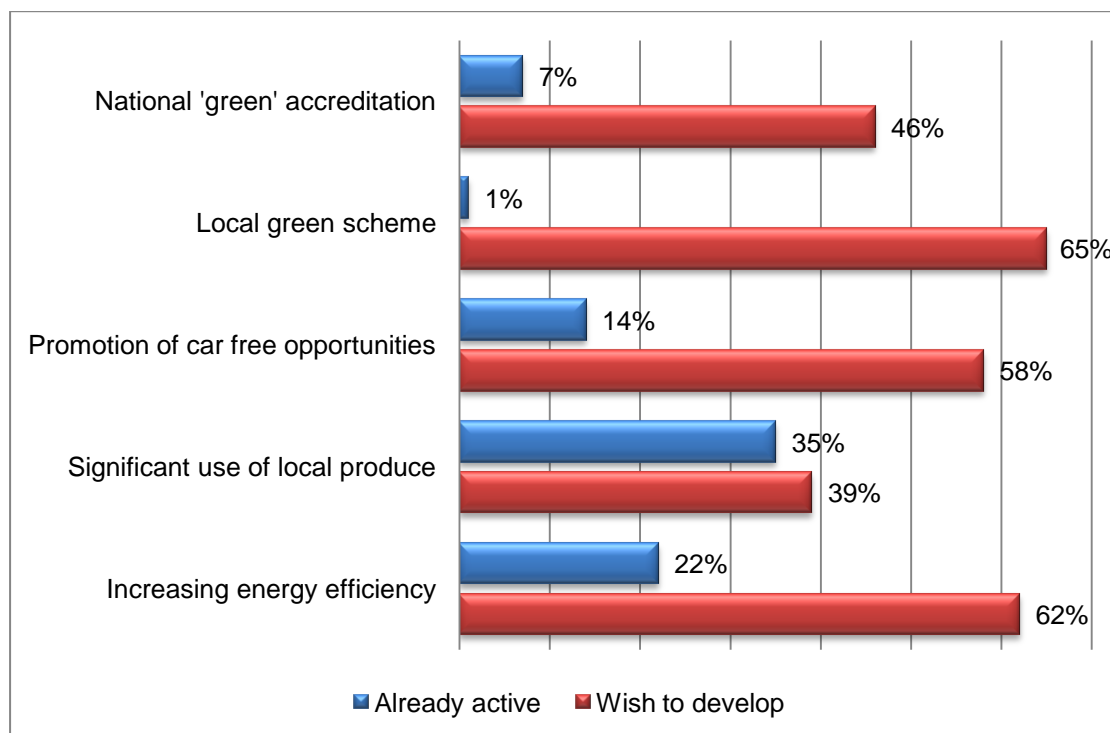
Figure B20: Marketing initiatives undertaken by businesses



Whilst the number of people specifically looking for a green holiday is still relatively low there is a lot of interest in the subject. It is widely thought that interest will continue to grow in the future. A number of Exmoor businesses are switched on to the opportunities that this

provides with many showing a strong interest in developing initiatives in line with green tourism principles, as shown in figure B21.

Figure B21: Businesses attitudes to sustainable tourism initiatives (ENPA business survey 2010).



More detailed information on business views and opinions can be found in the ENPA State of Tourism reports.

B6. Progress since last strategy & action plan

Despite a number of changes to the delivery of tourism support in the area significant progress has been made since the last verification visit. Examples of some of the achievements attained include:

- Evolution of the Exmoor Tourism Partnership offering an effective vehicle to co-ordinate tourism work between key players
- Redevelopment of the Visit Exmoor website as the key tourism site to the area and removal of duplicate sites
- Development of a unified co-ordinated brand for Exmoor
- Attraction and establishment of big events such as IronMan triathlon, Minehead Summer Festival, etc
- Agreement of a 3-year marketing strategy and delivery of a range of marketing campaigns
- Development of www.exploremoor.co.uk as a one stop site for public transport information

- Secured funding from a range of partners
- Development of the MoorRover demand responsive transport service for leisure use in the National Park
- Completion of the Coleridge Way linking the National Park and Quantock Hills AONB
- Increased communication including bi-monthly trade newsletters, annual conference and networking opportunities.
- A regular programme of visitor research
- Development of an interactive Visitor Map for the National Park
- Designation of Exmoor National Park as Europe's first Dark Sky reserve
- Sustaining a steady income level from the CareMoor for Exmoor Visitor Gifting scheme
- Provision of a range of training opportunities including a regular annual programme of Exmoor Awareness
- Delivery of the successful Active Exmoor project developing the area's outdoor activities and awareness of opportunities
- Funding secured for the imminent redevelopment of the Lynmouth Pavilion as a flagship National Park Centre
- Transfer of the Minehead Visitor Information Services to the voluntary sector
- High profile PR and press coverage
- Sustainable tourism principles embedded into core aims of the Exmoor Tourism Partnership and marketing strategy
- Social inclusion work such as the innovative Mosaic project and the provision of a New Audience Support fund in the National Park
- Good management of Public rights of Way with clear delegation arrangements from Highway Authorities as appropriate.

During the verification visit for the initial award of the European Charter for Sustainable Tourism two specific weaknesses were highlighted relating to the development of improved public transport opportunities in order to address the National Park's carbon neutral ambition and the need to manage Landover Safaris to avoid damage to habitats or tranquillity.

In terms of public transport good progress has been made, including the creation of ExploreMoor, a central website providing a co-ordinated resource for car free enjoyment of the area and the establishment of new bus services such as the 401 Exmoor Link and the MoorRover. Unfortunately the current reductions in public finance have put public transport services under heavy pressure and some routes within the Somerset area have been withdrawn. The Exmoor Carbon Neutral programme established the baseline carbon emissions from across the National Park and transport accounts for 18% of total carbon dioxide equivalents per annum.

The 2006 Natural Environment and Rural Communities Act automatically reclassified all RUPPs to Restricted Byways, thereby further limiting the opportunities for legal off-roading without the landowners consent. This has allowed land managers to develop dialogues with operators of off road safari tours allowing increased management of their use, for example

both the Crown Estate and National Trust have offered specific licences to certain businesses and these can detail which areas are suitable for this activity.

The report also highlighted 4 specific recommendations as summarised in the table in figure B14 along with the response to date.

Figure B14: Responses to verifier recommendations

Verifier recommendation	Response
A need to strengthen the relationship between the Visit Exmoor forum and the North Devon Marketing Bureau to ensure a consistent approach whilst avoiding duplication	Whilst neither of these organisations exist North Devon+, which has taken the role of the North Devon Marketing Bureau, is a core member of the Exmoor Tourism Partnership.
As the implementation phase of the strategic action plan for sustainable tourism runs to 2009, this will require a review within the period of the Charter award (2007-2012). There is a need to ensure that funding and staff provision for the delivery of the action plan remains a high priority past 2008, when current funding will run out.	An interim Action Plan covering 2010-2012 was prepared by the Exmoor Tourism Partnership and submitted to Europarc to bring in line the verification and action plan periods. Despite changes to the way tourism is delivered and the challenging financial climate tourism has continued to be prioritised by key partners, albeit with a growing emphasis on building the capacity of the private sector.
A need to capitalise further on opportunities and find creative solutions to encourage car-free visits and car-free use of the National Park.	As highlighted above the MoorRover service has been established and sustained along with the creation of the ExploreMoor website. Increased communication with the Transport Authorities led to the preparation of a significant bid to the Department for Transport for sustainable leisure travel. Whilst this was unsuccessful it has provided an opening for ongoing dialogue.
To maintain and develop business engagement with Visit Exmoor and to transmit sustainability messages to visitors, a membership package could be developed & could include National Park.	The Exmoor Tourism Association acts as the membership arm of the Exmoor Tourism Partnership and work is ongoing to support them building a tangible offer to the industry. The National Park Authority has published a National Park Pocket Guide which is available free of charge to accommodation providers.

B7. Challenges and opportunities

Tourism is affected by everyday life. It is sometimes viewed as a luxury, discretionary, spend; but at the same time everyone needs the opportunity to 're-create' themselves from time to time.

There are a huge number of factors that influence the performance of the sector – some of these are internal such as quality of product, effectiveness of marketing, adaptation to change, investment in staff and training, etc whilst others are external including the weather, national and international economic trends, infrastructure provision and much more. A series of specific challenges and opportunities facing tourism on Exmoor are explored below.

B7.1 Energy infrastructure including Hinkley

A planning application has been submitted to the Planning Inspectorate (for National Infrastructure projects) from EDF Energy to build two new nuclear reactors at Hinkley Point C in the parish of Stogursey which is located in West Somerset. The Planning Commissioners are expected to make their recommendation by the end of 2012 and refer this to the Secretary of State for Energy for his decision in early 2013. If the development goes ahead it will be the largest construction project that the SW has ever experienced and at a total cost of circa £10 Billion one of the largest in the UK. This project brings both threats and opportunities for the tourism industry. The three local authorities impacted by the project (West Somerset & Sedgemoor District Councils and Somerset County Council have sought from EDF Energy (via Section 106 Agreements) some specific funding streams to support additional staff resource and monies for the marketing and promotion of the area. This has been deemed necessary to help maximise the positive impacts, and minimise those, that could be perceived as negative.

A Tourism Action Partnership comprised of the three Local Authorities, EDF Energy and representatives from the Tourism Industry will monitor the situation and put into place mechanisms for promoting the area to the influx of new workers and help mitigate potential adverse effects, These could include the continued perception of the area as an attractive visitor destination as well as associated issues during the construction phase such as increased traffic congestion.

The new Tourism Action Partnership will need to be influenced by the Exmoor Tourism Partnerships' Strategic Action Plan. This must be seen and recognised as an important framework and delivery vehicle for putting in to place measures and actions that continue to support the local tourism economy during the construction phase of the Hinkley Point C Project.

As new forms of energy production are sought Hinkley is unlikely to be the only such energy infrastructure project proposed in the area. There are already similar issues faced with the proposed Atlantic Array windfarm proposed to be built 14km to sea from the North Devon coastline as well as from other energy projects including the increasing demand to place wind turbines in upland areas surrounding the National Park.

B7.2 Economic uncertainties

The international recession of the late 2000's continues to present a series of challenges, especially as the Government seeks to reduce public spending to reduce the public borrowing deficit. Whilst the UK is coming out of the double dipped recession many householders are facing increasing bills and a lower disposable income whilst funding support for tourism work is decreasing. Exmoor however will not be alone in these reductions, and although there will be local variances all areas will see a loss of resource. The relatively high level of lifestyle businesses and smaller owner-occupied businesses on Exmoor means the industry is more fragmented than other areas with a larger number of players with a lower overall stake involved making joint working a greater challenge.

However Exmoor has already begun to rise to the challenge with numerous examples across the area of communities and businesses getting more involved in tourism delivery (e.g. the formation of the Lyn Economy and Tourism Alliance launching the Exmoor Guinea scheme and the Minehead Development Trust taking on provision of the visitor information centre in Minehead). The public sector bodies will need to continue to play a role in supporting the sector and in particular facilitating cross boundary and sector working. The industry has a real opportunity to rise to the challenge and steer its own course, with some support, over the coming years.

B7.3 Climate Change

Climate change is already showing evidence of impacting on Exmoor. With its combination of the coast and moors and its westerly position taking the brunt of the prevailing weather the South West is perhaps one of the most vulnerable areas to Climate Change impacts. However the region is also one of the most advanced in working to not only mitigate climate change but also to adapt to the inevitable consequences (e.g. through the tourism sector group of Climate South West and their resources such as www.climateprepared.com). It will be important that businesses are prepared for an increase in extreme weather events which is already being seen (2012 saw the driest 3 months, immediately followed by the wettest 3 months since records began) as well as reducing dependency on fossil fuels as both an effort to slow down climate change and to prepare for significant rises in fuel costs as a result of peak oil.

Climate change is likely to create changes to the flora and fauna of the area and thus impact on the landscape that is admired by so many visitors. Whilst these effects are unlikely to affect the area during the course of this plan some thought needs to be given to how things may change in the future, how this will impact on tourism and what, if anything, should be done.

There are also some opportunities to come from climate change with the potential for warmer winters and possibly drier summers in the short to medium term providing more favourable conditions for tourism. There is a huge growing interest in green tourism and Exmoor is ideally placed to take advantage of this by demonstrating and marketing its sustainable tourism opportunities and track record.

B7.4 Barriers to access

The economic situation, rising fuel costs and lack of public transport all potentially create barriers to access Exmoor. Indeed there is already talk that the 'staycation' is to be replaced by the 'nearcation' as people seek to travel closer to home to avoid increased travel costs¹⁹.

The innovative Mosaic project led by the Campaign for National Parks has successfully developed a model of community champions to help overcome some barriers of access, initially for Black and Minority ethnic Communities and more recently for young people. They are now looking at whether the model can be further adapted to work with disabled people. The National Park Authority established a three year 'Support fund to new audiences' in 2011 through its Partnership Fund to help groups who wouldn't otherwise have the means to visit the area.

The work done to date to encourage greater use of public transport to the National Park to lower carbon emissions, has the potential to reap the benefits by already providing the resources for people to find relevant information on how to reach the area by alternative means to the private motor car as rising fuel costs make this prohibitive. Already the notion of slow travel has begun to garner interest and an increase in demand may make some public transport services more commercially viable (e.g. direct coach links to Exmoor from mainline stations).

B7.5 Competitor destinations

With relatively low population growth coupled with many households facing increased costs of living there is little room for market growth in the coming years. This will invariably mean an increase in competition amongst destinations. However those that can provide quality, unique experiences along with a warm welcome and genuine value will prosper and this can be largely achieved through strong partnership working.

B7.6 Technology

New technology is offering huge potential to market and sell destinations in new forms. TV advertising is no longer the preserve of the biggest destinations or at a regional level only with the plethora of digital channels now available. A clever campaign can go viral and reach an audience of millions via social media for very little cost at all.

Within the destination new technology can add value, encourage longer visitor dwell times and increase visitor satisfaction when used carefully to provide accurate real time, real place information and offers. However as discussed in section B2.7 Exmoor will require significant investment in infrastructure to take full advantage and compete on a level playing field with other destinations in utilising such technology.

B7.7 Experiences over destinations

Research by a number of organisations indicates that consumer preferences are changing. With modern technology and ease of travel many consumers are seeking unique

¹⁹ 'Britons increasingly opting for 'nearcations'. Telegraph Travel, 22 October 2012.

experiences over and above visiting a particular location. Whilst this may make the relatively strong awareness of Exmoor less valuable in the future given the breadth and scope of activities that the combined Greater Exmoor area offers there is a huge potential to exploit this. Wildlife watching, stargazing, heritage tours, traditional seaside fun, outdoor activities and sightseeing in a remarkable landscape are all examples of the types of experience that Exmoor can offer and package in a way that many other destinations can't.

B8. SWOT analysis

B8.1 Strengths

Tourism Product

- A high quality environment : an unspoilt natural and man-made combination, with diversity of scenery offering tranquillity, peace and quiet combined with a range of outdoor activities
- Nationally and internationally important habitats (AONBs / SSSIs / designated heritage coastline) and wildlife species, National Park status and 'iconic' wildlife – red deer and Exmoor ponies
- 'Exmoor ' is a recognised and established brand
- Breadth of offer and diversity in relatively compact area (Adventure, heritage, seaside, rural, etc
- Strong reputation for 'green' tourism
- National and Regional Trails: eg. South West Coastal path and the Two Moors Way and good local Rights of Way network: ease of access for walking, cycling and riding
- Cultural' tourism product: local festivals and events, music, literary connections, local food and drink and other locally produced goods, art and crafts, history, archaeology and heritage

Infrastructure

- Strong and effective public and private sector partnerships
- Range of private sector tourism/other trade associations, indicating an active tourism industry
- Good quality range of accommodation stock
- Ease of access to Exmoor from other parts of the country via motorway network with signage to Exmoor from M5

Economic

- High percentage of repeat visits amongst staying visitors
- Higher proportion of staying visitors than other national parks
- Changing pattern of visits into 'shoulder months' and 'off peak' seasons
- Increases in tourism businesses using local produce, adding value to the local economy

B8.2 Weaknesses

Tourism Product

- Lack of consistency within provision of "Quality" accommodation
- Limited range and number of wet weather & indoor facilities
- Poor public transport provision and links

- Lack of year-round provision of range of facilities for visitors – toilets, shops, restaurants, cafes, attractions, etc
- Ageing visitor demographic
- Lack of hire equipment

Infrastructure

- Limited numbers of facilities offering services to people with disabilities
- Lack of effective communication and networking structures within the tourism industry
- No single lead tourism organisation for the whole of the greater Exmoor area
- Confusion about roles and responsibilities of private sector associations and public sector organisations, amongst both sectors
- Limited use of the 'Exmoor branding' within the industry
- Lack of recognition of the importance of 'collective area marketing' to visitors, within some service related business sectors
- Poor signage for Exmoor from North Devon Link Road
- Poor road access from M5 to some of the key settlements
- Lack of mobile and broadband coverage

Economic

- Seasonality of tourism, part-time nature of employment and limited year around employment opportunities for local people
- Access to public transport for employees
- Recruitment and retention difficulties for employers

B8.3 Opportunities

Tourism Product

- Successful projects on which to continue to build a quality sustainable tourism product: e.g., European Charter for Sustainable Tourism; CareMoor for Exmoor
- ENPA Partnership Fund available to support appropriate projects
- Externally funded projects (approved and in development) adding value to the tourism product and offering mechanisms for extending the season
- Increased interest in 'green tourism' amongst visitors and greater awareness of environmental issues amongst visitors and businesses
- UK National Park family branding and marketing initiatives
- Healthy living agenda

Infrastructure

- Exmoor Tourism Partnership & Network to facilitate business engagement and reduction of duplication
- Use of Information Communications Technology
- Potential collaborative working between ETP, North Devon+ and Somerset Tourist Association
- Sub-regional regeneration partnership opportunities via the Heart of the South West Local Enterprise Partnership
- Range of business support and training providers with which to build partnerships
- Connecting Devon and Somerset and Exmoor Rural Community Broadband projects

Economic

- Development of new and 'niche' markets to extend the tourism season
- Potential increase in domestic visitor market due to uncertainty of international situation
- Low interest rates potentially making investment more appealing and increased disposable income
- Access to resources for support development: RDPE, Interreg, Heritage Lottery Fund, etc
- Hinkley Point
- Potential post 2012 legacy
- Potential for increase in 'nearcations' with rising fuel costs

B8.4 Threats

Tourism Product

- Conflicts between needs and wants of visitors and their impacts on the environment and local communities
- Trend of closure of large, traditional country hotels
- Increasing levels and complexity of government legislation
- Local Authority reduction in provision of toilets, etc
- Failure to attract younger visitors
- Failing to adopt new marketing techniques

Infrastructure

- Rural services decline limits opportunities for sustainable tourism transport
- Lack of adaptation to climate change / extreme weather events
- Planning constraints & regulations impacting on development opportunities for tourism
- Decreased public sector capacity and lack of capacity within private sector

Economic

- Increased competition from other tourism destinations, both domestic and global
- Public spending cuts – decreased capacity for tourism sector support
- Rising fuel prices
- Fear of job losses
- Labour and skills shortages, including basic skills
- House prices and lack of affordable housing for local people
- Uncertainty of international situation impacting on overseas visitors
- Strength of sterling – impacting on overseas visitors
- Competition for external funding resources
- Hinkley Point

C. Strategy

As identified in the previous section there are huge challenges as well as opportunities on the horizon for developing sustainable tourism across Exmoor. The plethora of bodies and organisations, geo-political boundaries and the diverse nature of the 'tourism industry' have, in the past, lead to fragmentation and communication issues. Partnership working is essential to the successful co-ordination of tourism development and marketing activity across the Greater Exmoor area. Without effective partnerships fragmentation will limit the area's potential as a sustainable tourism destination, resulting in disjointed marketing strategies and activities, duplication of activity, disparate information, and differing quality standards. In the development of this Strategic Action Plan we have sought to take into account the different roles, plans and strategies of many of these organisations in addition to taking account of the views expressed to the Exmoor Tourism Partnership and its partner organisations by visitors and businesses and the facts, figures and research collated and summarised in section B.

C1. Policy context & key strategic documents

An overview of the Exmoor Tourism Partnership was provided in chapter A2 describing how the partnership operates as a virtual organisation to draw together different organisations and co-ordinate tourism action. Figure C1 below shows the different bodies that, at some level, influence the work of the ETP core partners (marked with a *) and their key documents and objectives with relation to sustainable tourism.

Figure C1: Key organisations, documents and objectives.

Organisation	Key role, documents and relevant objectives
Central government	<p>The Government's tourism policy sets out 3 key aims to:</p> <ul style="list-style-type: none"> • Fund the most ambitious marketing campaign ever to attract visitors to the UK in the years following 2012; • Increase the proportion of UK residents who holiday in the UK to match those who holiday abroad each year; • Improve the sector's productivity to become one of the top 5 most efficient and competitive visitor economies in the world. <p>The Government's 2010 Vision and circular in English National Parks sets out priority outcomes including "Foster and maintain vibrant, healthy and productive living and working communities". 'Making tourism more sustainable' is a suggested action.</p>
Visit England – National tourist board with responsibility for domestic marketing and links with destination managers	<p>The Strategic Framework for Tourism 2010-2020 sets out an ambition to grow tourism by 5% p.a. Specific objectives include: To establish compelling destinations of distinction and to ensure a successful thriving industry. This includes recognition of the need for England's visitor economy to be underpinned by sustainable practices and principles. The concept of 'wise growth' is embedded in all action plans. A Rural Tourism Action Plan was published in 2011 to maximise the potential of the rural tourism offer by :</p> <ul style="list-style-type: none"> • To diversify and modernise rural tourism products to generate business opportunities suited to local environments and communities and to develop a year round visitor offer. • To increase consumer awareness, understanding and enjoyment of the products • To encourage rural communities and economies to benefit from the value of rural tourism by taking ownership for the development, management protection and conservation of rural assets and locations.

South West Tourism - Former Regional Tourist Board.	'Principles for success' was published as a legacy to inform future tourism planning maintaining the focus of the regional tourism strategy 'Towards 2015. 4 key priorities: Marketing to drive sustainable growth; Offer visitors compelling destinations of distinction; Champion a successful, thriving tourism industry; Improve the quality of the visitor experience.
Heart of the South West Local Enterprise Partnership	<p>The business plan details 4 objectives:</p> <ul style="list-style-type: none"> • Drive productivity and growth; • Attract new business and investment • Maximise employment opportunities • Promote infrastructure to connect with markets. <p>Tourism, Green Economy, Innovation and Rural Productivity are 4 of the 6 key focus areas</p>
Somerset County Council*	In the County Plan for Somerset (2012-13) under the 'Investing in our future' section the Council has committed to: Make it easier for people to visit and enjoy Somerset as a tourist destination.
Devon County Council	A new tourism strategy for the county will be prepared shortly via the newly formed Devon Tourism Partnership. The Devon Local Economic Assessment (May 2012) recognises the importance of the National Park as a magnet for tourism and leisure.
West Somerset Council*	<p>West Somerset Economic Strategy 2011 – Responding to Change sets out 4 strategic themes:</p> <ul style="list-style-type: none"> • Up-skilling and retention of skilled workers • Enterprise and entrepreneurship • Improving connectivity • Protecting and developing key assets <p>Tourism is acknowledged as 1 of 4 key sectors in the district.</p> <p>The Saved West Somerset District Local Plan (April 2006) provides the policy framework for planning decisions in the district outside of the National Park. A new plan is currently under development.</p>
North Devon+* - Economic delivery agency.	<p>Within their role of 'Growing the visitor economy' they seek to:</p> <ul style="list-style-type: none"> • Boost the local economy; • Generate employment; • Create a positive image; • Sustain local facilities; Support a better environment.
Exmoor National Park Authority*	<p>The Exmoor National Park Partnership Plan 2012-2017 sets out 3 key programmes:</p> <ul style="list-style-type: none"> • A living thriving landscape; • Connecting people and place and; • Towards a sustainable future. <p>The second programme is most relevant and the NPA has asked the ETP to provide strategic overview of progress towards the programmes first priority to "Promote Exmoor National Park as a special destination and develop the Exmoor brand."</p> <p>The Exmoor National Park Local Plan 2001-2011 provides the policy framework for planning decisions in the area. A new plan is currently under development.</p>
Exmoor Tourist Association*	The Exmoor Tourist Association is the only trade body solely covering the whole Exmoor area and has recently compiled its first business plan.
Quantock Hills AONB	<p>The Quantock Hills Management Plan 2009-2014 has two objectives in relation to Visitors and Recreation:</p> <ul style="list-style-type: none"> • To widen & adapt access opportunities across the AONB to protect wildlife, benefit visitors and support businesses in local communities; • To monitor visitor trends and activities, including impacts on Special Areas of Conservations.

C.2 Core partner roles

C2.1 Exmoor Tourist Association

The Exmoor Tourist Association was set up in 1982 to help maximise the benefits of sustainable tourism for its members and to bring members' businesses, and Exmoor, to the attention of people considering visiting Exmoor for holidays and short breaks. Its activities aim to benefit its members, local communities and the wellbeing of the Greater Exmoor region, by promoting the benefits of Exmoor to potential visitors. It is a non-profit making organisation, using their subscriptions for the promotion of their members and Greater Exmoor. Activities include regular newsletters, business offers for members, an annual literature exchange, member's helpline and newsletters.

The ETA currently has over 200 members and is the largest single trade association focusing solely on the Greater Exmoor area.

C2.2 West Somerset Council

West Somerset Council has played a key role in the development of the Exmoor Tourism Partnership and is the district council covering a significant area of Greater Exmoor. The council has provided funding and support for a range of tourism-based initiatives. West Somerset Council's Economic Strategy (2011) identifies tourism as a key economic driver for the area, and therefore a strategic priority.

West Somerset Council is also a planning authority covering the district outside of the National Park and this is an important role in managing the destination.

C2.3 Exmoor National Park Authority

The principal role of the Exmoor National Park Authority is to deliver National Park core purposes (detailed in B1.2) with a duty to seek to foster social and economic well being whilst delivering them. The focus of the Authority in relation to tourism can be described within 4 key areas:

- Taking a lead role in the conservation and enhancement of the special qualities of the National Park on which the tourism economy is wholly dependent upon, including its work as a planning authority.
- Taking a lead in maintaining the recreational and tourism infrastructure such as the Public Rights of Way Network access to areas of open access, and promotion and maintenance of regional and national trails.
- Visitor information and guidance on places to visit, and things to do through National Park Centres, Local Information Points, support for local information centres, publication of the Exmoor Visitor, provision of ranger services etc.
- Support and development of Sustainable Tourism activities through training sessions, information briefings, research and monitoring of trends, providing energy efficiency advice to tourism businesses, facilitating improved transport links and co-ordinating with other tourism bodies.

C2.4 North Devon +

North Devon+ is the economic delivery agency for the area, working with Torridge District Council, North Devon Council, Devon County Council, the South West of England Regional Development Agency and the private sector to deliver projects and initiatives that encourage and support business growth, improve quality of life, and address social and economic inequalities.

Tourism is a key business sector for the area and for North Devon +. With a private sector membership of over 500 businesses, they act as the Area Tourism Partnership (within the Devon destination management framework) for North Devon and Torridge (including 1/3 of Exmoor National Park), marketing the area as a year-round high quality destination, providing a wide range of membership services for local businesses, and representing and driving forward the interests of the sector. North Devon + represent the North Devon area within Visit Devon which co-ordinates promotion for the whole of Devon as a tourism destination through the six Area Tourism Partnerships.

C2.5 Somerset County Council

Somerset County Council plays an important role, particularly through facilitation of large scale projects such as Connecting Devon and Somerset which will provide Superfast Broadband to a wide area. They work with key partners to support the local economy and have recently worked closely with the Somerset Tourist Association (see below) to transfer management of the Visit Somerset website to them and supporting them to take a strategic role in delivering tourism support in the area alongside the ETP. Making the most of Exmoor while recognising its special position was a strategic priority within the most recent Delivery Plan for tourism in Somerset stating *‘Exmoor’s brand strength, national park status and existing level of coordination of tourism mean that it needs to retain its identity while linking into the new Somerset programme’*.

C2.6 Key organisations

The core partners invite key organisations to join them at meetings to allow for the benefits that naturally occur through partnership working. These organisations are supportive of the work of the Partnership but tend to have less capacity to be more directly involved.

The Somerset Tourism Association was previously the Sedgemoor Tourist Association. When the Local Authority led Somerset Tourism Partnership wound down the Association expanded its geographical remit to take over some of the key assets such as running the Visit Somerset website and producing the Somerset tourism brochure alongside hosting PR familiarisation visits and other marketing work.

The Quantock Hills AONB team supports and delivers the conservation of the Quantock Hills AONB under the guidance of a Joint Advisory Committee and wider Partnership.

C2.7 Exmoor Tourism Network

In addition to the above named organisations there is a wider Exmoor Tourism Network that comprises of the numerous thematic and geographic based industry groups including (but not limited to):

- Combe Martin Tourism Association
- Exmoor (Farm and Country) Holiday Group
- **Exmoor to Sea (attractions)**
- Lynmouth Association for Commerce and Tourism / Lynton TIC
- Minehead Hospitality Association
- Porlock Tourism Association
- South Molton Tourism Association
- **WACET**

C3. *European Charter for Sustainable Tourism Principles*

The underlying aims of the European Charter for Sustainable Tourism in Protected Areas are:

- To increase awareness of, and support for, Europe's protected areas as a fundamental part of our heritage, which should be preserved for, and enjoyed by, current and future generations.
- To improve the sustainable development and management of tourism in protected areas, which takes account of the needs of the environment, local residents, local businesses and visitors.

These aims are embedded into the Vision, Mission and Objectives of the Exmoor Tourism Partnership (see below).

The Charter provides a further set of 10 guiding principles that have been used to develop the actions within this Strategic Action Plan:

1. To involve all those implicated by tourism in and around the protected area in its development and management;
2. To prepare and implement a sustainable tourism strategy and action plan for the protected area;
3. To protect and enhance the area's natural and cultural heritage, for and through tourism, and to protect it from excessive tourism development;
4. To provide all visitors with a high quality experience in all aspects of their visit;
5. To communicate effectively to visitors about the special qualities of the area;
6. To encourage specific tourism products which enable discovery and understanding of the area;
7. To increase knowledge of the protected area and sustainability issues amongst all those involved in tourism;
8. To ensure that tourism supports and does not reduce the quality of life of local residents;
9. To increase benefits from tourism to the local economy
10. To monitor and influence visitor flows to reduce negative impacts.

C4. Exmoor Tourism Partnership Vision

Exmoor will be recognised as one of the top visitor destination brands in the country, renowned for offering high quality and sustainable tourism experiences, and which is led by a successful tourism industry and supported by the community.

This compliments the vision that the National Park Authority has adopted in its emerging Local Plan and within the Partnership Plan for Exmoor National Park 2012 -2017 for recreation and tourism in 2030:

“There is increased public awareness and enjoyment of the National Park, a warm welcome and high quality experience for everyone seeking inspiration, tranquillity and active outdoor recreation, leading to greater understanding of Exmoor and its way of life and a wider appreciation of the contribution that National Parks make to quality of life.”

C5. Mission of Exmoor Tourism Partnership

The Exmoor Tourism Partnership (ETP) will operate as an innovative and professional representative body working to reduce duplication and providing a co-ordinated focus for the efforts of all organisations and businesses working to support and grow tourism in Greater Exmoor.

C6 Objectives

C6.1. To increase the value from domestic and international visitors by addressing seasonality, length of stay and increasing numbers where appropriate, and by positioning the area’s tourism products as being distinct, high quality and competitive. (meeting charter principles 4,5,6,9,10)

Whilst an Exmoor brand has been developed there is significant work required to roll this out and ensure strong consistent coverage in line with the Brand Guidelines.

Much of this objective revolves around the need for a clear, consistent and yet flexible approach to marketing. In order to achieve this the ETP has developed and agreed a 3 year marketing strategy²⁰ 2011-2014 main seasons (See Appendix 1). This will be reviewed and a new 3 year plan drawn up. Each year an annual marketing plan will be developed inline with this Strategic Action Plan and the direction of travel set in the marketing strategy whilst responding to the needs, opportunities and trends available.

Visit England and the South West Tourism Principles for Success highlight the need for destinations of distinction. ETP partners will be working to demonstrate the unique qualities of Exmoor as a distinct destination with a continued emphasis on quality of product and service whilst remaining competitive.

This Strategic Action Plan first and foremost looks to grow the value of tourism - in many cases this can be achieved through increasing current visitor dwell times and length of stay, converting day visitors to overnight visits and adding value to the tourism product. However

²⁰ Exmoor Tourism Partnership Marketing Strategy 2011-2014 (See appendix 1)

there is also capacity to grow the volume of visitors with careful management, particularly outside of the main peak season.

Alongside our own marketing work we will seek to work alongside others in joint initiatives these may be geographical neighbours, regional schemes or thematic themes such as working with other members of the National Park family.

To fulfil this objective partners will work to:

- **Promote Exmoor using a co-ordinated brand**
- **Market the area strategically, based on sound evidence and market trends**
- **Work in partnership with others to add value to marketing ambitions**
- **Maximise the potential of technology in marketing the area**
- **Work to reduce issues around seasonality**

C6.2. To build on the destinations position as a leader in sustainable tourism, managing tourism to conserve and enhance the special qualities of the area that underpin the tourism product, and increasing visitors understanding and enjoyment of the area. *(meeting charter principles 3,4,5,6,7,8,10)*

Earlier sections of this Strategic Action Plan have demonstrated the need to not only conserve the special qualities of the area but to also ensure tourism benefits from the unique and diverse environment that Greater Exmoor has to offer.

Partners will seek to encourage businesses to take grass roots action with regards to sustainable means of operation and seek to manage the negative impacts whilst enhancing the positive impacts of tourism within the areas protected landscapes.

Encouragement will be given to help visitors make more use of public transport in the area as an alternative to the private car. Numerous projects will continue the work done to date to provide relevant and timely information to visitors and to interpret the special qualities of the area for their enjoyment of the area. Where resources allow we shall seek to develop the infrastructure and activities available for people to discover Exmoor.

Local produce, where farmed sustainably can help to enhance the authenticity and satisfaction of a visitors experience whilst also helping to manage the landscape that is admired by the majority of visitors and supporting the long term viability of farming in the area.

Partners will seek to expand the range of experiences, and opportunities available to visitors whilst maintaining the current facilities.

To fulfil this objective partners will work to:

- **Encourage, support and promote sustainable business practice**
- **Manage the negative impacts and enhance positive experiences of tourism in protected landscapes**
- **Support and promote car free opportunities**

- Support and encourage greater provision and uptake of local food and products
- Increase understanding and enjoyment through information & Interpretation
- Encourage the development of appropriate recreational products
- Develop the areas literary connections and package these as an enhanced product
- Maintain and enhance recreational infrastructure and use

C6.3 To take a joint leadership role with partners on issues affecting the tourism industry, consult with stakeholders, encourage professional standards, identify issues, trends and opportunities and coordinate partner actions, seeking funding and resources to maximise potential.*(meeting charter principles 1,2,7,8,10)*

The ETP has already made significant progress in reducing duplication, co-ordinating initiatives and supporting the sector to become stronger and more self supporting going forwards. The partners have a key role to play in continuing to provide a strong and coherent voice to and for the sector showing leadership, providing timely advice research and support and maximising the value of ever increasingly scare resources. North Devon+ allow the ET A access to their LIST local inspection scheme whilst the ETA and Exmoor Farm Holiday Group have held joint events to promote quality.

To fulfil this objective partners will work to:

- Facilitate, collate and disseminate relevant research to guide the actions of the sector and industry
- Operate as an effective, influential and respected tourism partnership
- Take joint leadership on key issues affecting the industry and support wider sector projects
- Consult & Engage with stakeholders

C6.4 To support individual tourism businesses by all possible means and help build the capacity of the tourism industry and wider sector, encourage quality, training and networking, and help maximise the potential of trends and opportunities in order to enhance business profitability and support sustained industry growth.*(meeting charter principles: 1,6,9)*

The current tourism sector is made up of a large and diverse range of individual businesses and community / voluntary organisations providing a number of events and services. Greater effort is required to ensure the industry can work together for mutual benefits, through collaborative working, shared initiatives and mutual support. This needs to extend beyond traditional tourism businesses such as accommodation, attraction and activity providers to incorporate the whole sector including food and drink, local retailers, farmers and land managers and many more.

Given the importance of tourism to the local economy there is a clear need to develop the profitability and long term sustainability of the sector especially in a period when public sector support will invariably decrease as a result of the economic situation. The ETP will seek to support individual businesses and collaborations in providing networking opportunities, providing support and encouragement to increase the quality of the tourism offer and supporting them in accessing the infrastructure needs identified to allow the sector to grow in profitability in a wise manner.

To fulfil this objective partners will work to:

- **Facilitate industry & sector networking**
- **Promote the concept of quality within the industry**
- **Provide and promote training in accordance with industry needs**
- **Facilitate business support and infrastructure requirements**
- **Build the capacity of the industry**

C7. Benefits

Outlined below are some examples of how the sustainable tourism strategic action plan will bring benefits to local businesses, visitors, communities and local people, and the environment.

C7.1 Local tourism and other ‘service’ businesses

- Fill the ‘shoulder’ seasons and lengthen the tourism seasons to increase the long term sustainability of businesses
- Increase the value of tourism to local tourism and other service businesses (restaurants, pubs, local shops, etc)
- Spread the volume and value of tourism across Exmoor
- Increase spend per head to benefit individual businesses and the local economy
- Assist in the professional development of tourism business owners and managers
- Improve opportunities for the recruitment and retention of quality staff
- Increase understanding of, and access to information on, visitor markets, needs and expectations through research and other activities
- Raise the profile of Exmoor as a quality destination

C7.2 Visitors to Exmoor

- Increase standards and the quality of services and facilities provided for visitors, matching the needs and expectations of the differing visitor markets
- Increase access to information on quality services and facilities to the visitor and the quality of the information provided to visitors
- Widen access to services and facilities for all
- Establish mechanisms for visitor/customer feedback and the effective resolution of problems and complaints
- Encourage the wider provision of services available to visitors, both during ‘peak’ and ‘off peak’ seasons – extending opening hours, etc
- Increase linkages between different types of service providers, to develop a quality tourism product for the visitor

C7.3 Local communities and local people

- Increase visitor spend on, and appreciation of, local 'cultural' products (food, drink, arts, crafts, other locally produced products, events, festivals)
- Maintain and enhance the special qualities of Exmoor
- Establish supply chains between local producers and local buyers
- Increase opportunities for 'year round' employment for local people, especially young people, within the tourism industry
- Increase levels of remuneration within the tourism industry
- Assist in the delivery of appropriate training programmes for increasing employment opportunities amongst both younger and older people
- Increase professional skills and capacity amongst local people and communities

C7.4 The Environment

- Manage tourism, including the location and operation of enterprises and the flow of visitors, to minimise impact on sensitive areas, local people, and other visitors
- Maximise the use of public transport opportunities
- Improve the quality of the environment: appearance, cleanliness, etc
- Increase visitors contributing to environmental enhancement and conservation activities
- Develop greater awareness of environmental and other issues and responsible behaviour amongst visitors
- Promote environmental sustainability practices amongst tourism businesses

D. Action Plan

The Action Plan forms an integral part of this document. It identifies a series of practical actions, which have been listed both under one of the key objectives and strategic activities identified in section C above. Some actions may help to achieve a number of objectives within the Action Plan, but have usually been assigned to one key objective rather than duplicated under each separate objective to which they might relate.

D1. Implementation & Resources

Each action has been assigned to a Lead Partner, although the achievement of the actions, in the majority of cases, will be dependent on partnership working with other organisations. In most cases these actions have been taken from the lead partners own strategic plans or equivalent documents or have been taken on to fill a required gap. It will be the lead partner's responsibility to lead on resourcing and implementing the action.

The actions listed are key actions. Invariably over the course of the plan's delivery there will be other actions will be identified and incorporated into the Strategic Activities as appropriate.

Some of the actions listed would best be performed by a partners working collaboratively and in such instances the lead is shown as the Exmoor Tourism Partnership

Resource implications have been identified in the last column, to show how existing and/or additional resources will need to be secured to achieve the identified actions. The term 'resources' refers to both financial and other resources – such as paid staff time, voluntary time, in-kind contributions, etc. Where staff time is noted this includes both paid and voluntary time – it is recognised that as part of their contribution to the delivery of the action plan the industry provides many hours of volunteer time.

It should be noted that this Action Plan is based on the current level of resources and any significant changes will create a need to review the plan. The plan has however been developed with an explicit view to build the capacity of the private sector given the current reduction in public funding.

D2. Monitoring and review

The Action Plan that follows includes a series of success indicators, under each key objective, that will be measured, monitored and reported on at regular intervals in order to understand the progress being made.

The Action Plan is designed to be flexible and responsive to the needs of organisations, businesses and communities in the Exmoor area and the visitors who come to enjoy it. It is a 'living document' that will be reviewed every five years and updated annually to take account of important changes as they happen. Given the time length of the plan it is

anticipated that changes will need to be made as, for example partner organisations adopt revised key documents (e.g the Quantock Hills AONB will adopt a new Management Plan in 2014 which may lead to a change in some of their actions).

D3. Delivery partners

CE = Crown Estate

DCC = Devon County Council

ENPA = Exmoor National Park Authority

ETA = Exmoor Tourist Association

**ETN = Exmoor Tourism Network
(incorporating recognised local / thematic
trade associations)**

**ETP = Exmoor Tourism Partnership
(collective action)**

**ETPMG = Exmoor Tourism Partnership
Marketing sub Group**

**ETPWG = Exmoor Tourism Partnership
Website sub Group**

**HTAP = Hinkley Tourism Action
Partnership**

LAF = Local Access Forum

LCDT = Lyn Community Development Trust

MEG = Minehead Events Group

MVG = Minehead Vision Group

ND+ = North Devon+

NT = National Trust

**QHAONB = Quantock Hills Area of
Outstanding Natural Beauty team**

SCC = Somerset County Council

STA = Somerset Tourist Association

WaW = Walkers are Welcome initiatives

WSC = West Somerset Council

There are many more players involved in the support and delivery of tourism including community groups, land managers, individual businesses, parish and town councils and many more. The engagement, contribution and involvement of all these bodies will be essential to the delivery of this Action Plan led by partners in the Exmoor Tourism Partnership.

Objective 1:

To increase the value from domestic and international visitors by addressing seasonality, length of stay and increasing numbers where appropriate, and by positioning the area's tourism products as being distinct, high quality and competitive.

Success indicators:

- Value of tourism
- Jobs supported through tourism
- Visitor numbers (day and staying)
- Website unique visits, page visits, bounce rates
- Advertising value equivalent of PR coverage achieved
- No. of subscribers to e-newsletters
- Proportion of quality accredited businesses
- Brand awareness

Strategic activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
1A - Promote Exmoor using a co-ordinated brand	Encourage industry use of the Exmoor brand via trade communications	High	From Autumn 2012	ETA, ETP, ETN	Staff time only
	Ensure all ETP backed campaigns incorporate the Exmoor identity and adhere to the brand guidelines	High	Ongoing	ETP	Within existing work
	Ensure the North Devon and Exmoor Brand Guidelines are adhered to in all promotional material	High	Ongoing	ND+	Within existing work
	Explore further destination/themed use of the brand to satisfy local needs (e.g. Exmoor – Minehead heritage steam coast or Exmoor – seaside fun)	Mid	2013	WSC, ETP	Within existing work
	Encourage use of brand in relevant partner press activity to help raise awareness of ETP, and partner involvement	High	Ongoing	ETP	Within existing work
	Conduct specific PR activity/promotions that will increase brand awareness among visitors	Mid	Ongoing	ETP	Within existing work
	Explore options and secure funding if required to produce an ETP image library, identifying and filling gaps in the collection	High	2013	ETP	Funding to be secured

Strategic activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
1B - Market the area strategically, based on sound evidence and market trends	Review, agree and implement new marketing strategy	High	In place for Autumn 2013	ETPMG	Staff time only
	Devise, implement and regularly review a yearly marketing plan in line with agreed marketing strategy	High	Annually	ETMGP	Funding for delivery in 2013 & 14 partially secured through WSC and ENPA Partnership fund contributions. Further funding to be secured.
	Devise a website strategy, including action plans for web development and new functionality, SEO, content and income generation	High	Jan-Apr 2013	WSC, ETA, ETPWG	Website to become self financing through advertising revenue.
	Secure funding to carry out analysis of target markets in order to guide future strategic planning	Low	2014	ETPMG	Funding to be secured
	Produce an annual web stats report	Mid	Annually	ETA, WSC	Staff time only
	Set up a system to measure customer feedback and web reviews and feed into marketing planning	Low	Annually	ETPWG, ND+	To be identified
	Work with information centres to identify information and literature gaps	Low	Winter 2013	ENPA, WSC, ND+	Staff time only
	Explore and appraise new potential marketing activity and industry income generating options	Mid	Ongoing	ETPMG	Staff time only
	Review effectiveness of brochure and consider potential exit strategy	High	Summer 2013	WSC, ETPMG	Staff time only
	<i>Please also refer to research actions listed under objective 3 which will inform strategic marketing.</i>				
1C - Work in partnership with others to add value to marketing ambitions	Support the delivery of Britain's Breathing Spaces and National Parks Week	High	Ongoing	ENPA, ETP	
	Incorporate 60th anniversary of Exmoor as a National Park in marketing campaigns	High	2014	ENPA	
	Explore potential for joint marketing with neighbouring brands such as North Devon + and Somerset Tourist Association	Mid	Ongoing	ETP, ND+, STA	To be identified

Strategic activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
	Work with Visit England marketing campaigns	High	Ongoing	ND+, ETP	Initial funding secured from RGF and private sector match
	Keep abreast of potential opportunities with other organisations, such as Visit Britain, National Trust, Tour Operators, South West Coast Path etc.	Mid	Ongoing	ETP, Other relevant bodies	To be identified
	Work with partners to promote rural tourism via the COOL EU funded project	High	To spring 2015	SCC, WSC, ENPA, ETA	Funding secured via EU Interreg
	Work with partners on the Hinkley Tourism Action Partnership to promote the area	High	Summer 2013	WSC, SCC	Funding secured via Hinkley S106
1D - Maximise the potential of technology in marketing the area	Identify sustainable funding package for annual web development needs for the Visit Exmoor site(e.g. editing of web templates), with review of overall design leading to possible re-design, every three years	High	Annually	ETA / ETPWG	Staff time only to identify future options.
	Carry out web usability testing with site visitors on agreed regular basis	Low	Annually	ETA / ETPWG	To be identified
	Consider options for online booking functionality	Low	Annually	ETA / ETPWG & ND+	Staff time only to identify future options.
	Review and redesign Northdevon.com as required	Mid	Annually	ND+	Secured
	Continue to expand activity on social media growing followers through innovative campaigns	High	Ongoing	ETPMG, ND+	Within existing work
	Consider options for embedding social media and reviews sites, such as Twitter and Trip Advisor on websites	Mid	Ongoing	ETA / ETPWG	Within existing work
	Devise inspirational new web tools to help promote the area (e.g. apps, interactive guides and maps)	Mid	Ongoing	WSC, ENPA, QHAONB	External funding to be secured
	Support technology related activity delivered by others (e.g. Porlock and Minehead Apps)	Mid	Ongoing	WSC	External funding to be secured
	Secure funding to develop series of seasonal and themed videos/films	Mid	2014	ETPMG	External funding to be secured
	Investigate the potential of using social data for marketing purposes	Low	Autumn 2013	ETPMG, ND+	Staff time only to identify future options.

Strategic activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
1E - Work to reduce issues around seasonality	Explore publication of specific off-peak information highlighting seasonal opportunities	Mid	Spring 2014	ETA	External funding to be secured
	Maintain and promote status of ENP as an International Dark Sky Reserve	Mid	Ongoing	ENPA	Within existing work
	Develop wet weather information for visitors in order to enhance the experience whatever time of year	Mid	Spring 2014	ETA	Staff time only
	Support the development of all year round programmes of events, and in particular off-season events based on sustainable principles	High	Ongoing	ETP, WSC, ENPA, ND+, ETN, MVG	Funding to be secured where required.
	Seek a sustainable future and business model for the annual walking festival	Mid	Spring 2013 & Ongoing	ETA	Staff time only to establish sustainable business model.

Objective 2:

To build on the destinations position as a leader in sustainable tourism, managing tourism to conserve and enhance the special qualities of the area that underpin the tourism product, and increasing visitors understanding and enjoyment of the area.

Success indicators:

- % of establishments holding green awards;
- Proportion of public transport use vs. private car use
- Visitor satisfaction with quality of natural environment
- % of Rights of Way in 'easy to use' condition
- Visitor numbers to National Park Centres / TICs

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
2A - Encourage, support and promote sustainable business practice	Develop an Exmoor Charter and roll out to 30 businesses per year in first 3 years.	High	Pilot Autumn – winter 2012/13, Launch spring 2013	ENPA, ETN	Staff time only initially - self financing model to be developed.
	Actively promote holders of recognised green awards (GTBS, David Bellamy, Exmoor Charter etc)	High	Ongoing	ETA, WSC ENPA	Within existing work
	Run at least 1 Keeping Exmoor Special training session a year.	Mid	Ongoing	ENPA	Delegate fees to cover costs
	Develop and disseminate 2 new case studies per year on successful sustainable tourism practice	Mid	Annually	ENPA	Staff time only initially - self financing model to be developed.
2B - Manage the negative impacts and enhance positive experiences of tourism in protected landscapes	Review and deliver CareMoor for Exmoor	Mid	Review from Autumn 2013 & ongoing	ENPA	Raise annual revenue from £5k to £10k
	Revalidate and retain European Charter for Sustainable Tourism in protected areas	High	Spring 2013 & winter 2018	ENPA / ETP	Staff time only plus fee to be secured.
	Development of simple recreation management plans for popular visitor locations where problems exist.	High	Ongoing	ENPA, ELAF, landowners and community groups.	Within existing b

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
	Run annual series of Exmoor Awareness workshops for tourism providers to gain a greater insight into the special qualities of the National Park	Mid	Annually	ENPA, ETP	Delegate fees to cover costs
2C - Support and promote car free opportunities	Maintain and develop the ExploreMoor website	High	Ongoing	ENPA	Staff time only
	Embed sustainable travel options within mainstream promotions	Mid	Ongoing	ETP (Marketing group.)	Within existing work
	Promote the potential and benefits of non car use (e.g. create car free itineraries)	Low	Ongoing	ETP	Secure from existing budgets
	Liase with private operators to support inward public transport links to the area (e.g. Berry's Superfast and proposed S Wales ferry link)	Mid	Ongoing	ETA	TBC
	Liase with transport providers and Authorities to maintain a core network suitable for visitor use.	Mid	Ongoing	ENPA / SCC / DCC	Significant funding required from Transport Authorities and new sources.
	Utilise and encourage uptake of Walkers and Cyclists are Welcome Schemes via 1 workshop per annum	Mid	Annually	ETA	Delegate fees to cover costs
2D - Support and encourage greater provision and uptake of local food and products	Promote local food opportunities within mainstream marketing	Mid	Ongoing	ETP	Within existing work
	Promote North Devon and Exmoor local produce at national food events	Mid	2013	ND+	Funded through Leader 4 Gearing up 4 growth
	Support micro food businesses to establish new markets	Mid	2013	ND+	Funded through Leader 4 Gearing up 4 growth
	North Devon FoodFest promoting local food producers with celebrity chef endorsement	Mid	Annually	ND+	Private Sector funding and sponsorship
	Publish the North Devon Food and Drink Guide	Mid	Annually	ND+	Private Sector funding
	Launch local food and drink box scheme	Mid		SCC	Funded via EU fish and Chips project
	Support delivery of local food project	Mid	2013	WSC / QHAONB	LARC funding secured

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
2E - Increase understanding and enjoyment through information & Interpretation	Publish annual Exmoor Visitor newspaper	High	Annually	ENPA	Cost neutral through advertising revenue
	Develop and operate new Lynmouth National Park Centre year round	High	Open from Spring 2013	ENPA	Secured through ENPA, DCC Invest in Devon, HLF, Leader 4 North Devon
	Maintain a network of National Park Centres	High	Ongoing	ENPA	Secure from existing budgets
	Support local Tourist information Centres including Minehead, Porlock, Combe Martin, Watchet and Lynton in meeting customer needs	High	Ongoing	ENPA / WSC / ND+	Ongoing grants to be secured
	Provide relevant literature and resources regarding the special qualities of the area e.g. Pocket Guides and maps.	Mid	Ongoing	ENPA / QHAONB	Secure from existing budgets
	Promote ENP orientation maps to local businesses	Mid	Spring 2013	ENPA	Costs covered through sales
	Review ENP Local Information Points	Mid	Spring 2013	ENPA	Staff time only
	Consider options for new gateway signage to the National Park and region	Low	Autumn 2013	ENPA, ETP	funding to be secured for any implementation.
	Secure funding for augmented reality and user generated content layers for myDevon mobile app and enhancement of content across North Devon and Exmoor	Mid	Apr-13	ND+	EOI successful, full bid to REG in Jan 13
	Roll out Sense of Place business support to Museums, Heritage Centres and TICs to develop sustainable business models	High	Oct 12 to Nov 13	ND+ AONB and NDTT	funding secured through Leader 4
	Secure funding and deliver 3 year interpretation and education project based at the new Pavilion facility in Lynmouth.	Mid	From Summer 2013	ENPA	£250k sought from Heritage Lottery Fund - development stage approved.
2F - Encourage the development of appropriate recreational & enjoyment products	Support and promote opportunities available through the Countryside Sports South West, South West Coast Path, Outdoor + Active and 1 South West RDPE funded projects	Mid	Projects delivered to April 2016. Ongoing legacies to be secured.	ETP	RDPE funding secured
	Ensure access opportunities exist to encourage all users including easy to use short walks and easy to use to follow signage.	High	Ongoing	ENPA, SCC	Within existing work

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
	Explore opportunities to maintain and enhance the Active Exmoor brand and offer, including website	Mid	Ongoing	Active Adventure South West, ENPA.	Staff time only initially - additional resource to be secured for new actions
	Support proposals for creation of a Forest Park at Dunster and Cycling Centre by Crown Estate	Mid	TBC	CE, ETP	To be determined
	Provide business support to investors looking to develop new tourism products in the area and align those ideas effectively with market trends and sustainable business practise.	Mid	Ongoing	ND+, ENPA, ETA, WSC	Private Sector
	Provide support, advice and intelligence to emerging technologies in the countryside (e.g. Trampers, E-bikes etc)	Mid	Ongoing	ETP	Funding to be secured as required.
	Provide new accessible routes using the Photo Trails website for people of all abilities and support volunteers to maintain resource.	High	Spring 2013 onwards	ENPA	Within existing work
	Work in partnership to promote and establish themed break packages and itineraries for all seasons.	Low	Spring 2014 onwards	ETP	Within existing work - further funding to be secured if required.
	Promote and develop packaged themes based on the Walkers are Welcome initiative	Low	Spring 2014 onwards	WaW towns, ENPA, ETA	Staff time only
2G - Develop the areas literary connections and package as an enhanced product.	Develop packs for businesses promoting the area's Coleridge links	Mid	Summer 2013	QHAONB, ENPA, WSC	Funding to be secured as required.
	Explore feasibility of extending the Coleridge Way to Lynton / Lynmouth	Mid	Summer 2014	ENPA / LCDT	Funding to be secured as required.
	Include literary links information in mainstream promotions (Coleridge, Wordsworth, R D Blackmore, Henry Williamson etc)	Mid	Ongoing	QHAONB, ETP	Within existing work
2H - Maintain and enhance recreational	Ensure recreational infrastructure and events are managed to a high standard offering users with a quality experience whilst protecting the environment.	High	Ongoing	ENPA, QHAONB, SCC	Within existing work

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource requirement
infrastructure and use	Seek annual liaison with Local Access Forums	Mid	Annually	Somerset and Exmoor LAFs, SCC, ENPA, QHAONB	Staff time only
	Continue special support and promotion of long distant routes such as South West Coast Path, Coleridge Way and Two Moors Way	High	Ongoing	SCC, DCC, QHAONB, ENPA	Within existing work
	Encourage continued management to a high standard of car parks, toilet facilities and RoW	High	Ongoing	ENPA, WSC, SCC	Within existing work

Objective 3:

To take a joint leadership role with partners on issues affecting the tourism industry, consult with stakeholders, encourage professional standards, identify issues, trends and opportunities and coordinate partner actions, seeking funding and resources to maximise potential.

Success indicators:

- Surveys completed and results disseminated
- Number of ETP meetings
- Additional external funding secured by partners
- No. of training opportunities promoted
- Satisfaction of communities re tourism on Exmoor

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resources required
3A - Facilitate, collate and disseminate relevant research to guide the actions of the sector and industry	Complete biennial visitor surveys	High	Data collection: July – Dec 2012, 2014, 2016	ENPA QHAONB, ND+	Existing resources secured
	Complete annual business survey	Mid	Annual	ENPA	Existing resources secured
	Participate in UK National Parks Awareness Survey	High	2012, 2017	ENPA	Existing resources secured
	Work with Visit England to establish market trends, brand awareness and customer feedback and devise and deliver appropriate marketing campaigns for the area accordingly	High	Ongoing	ND+	Existing resources secured
	Establish an evidence base from all available research including primary research conducted on line	High	Ongoing	ND+	Own resources
	Publish annual State of Tourism Report	High	Annual	ENPA	Existing resources secured
	Commission annual reports on value and volume of tourism in ENP and Greater Exmoor	High	Annual	ENPA	£3,500 p.a. from ENPA secured
	Explore options and implement real time monitoring of business trends	Mid	From spring 2013	ENPA	£1k per year to be sought

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resources required
	Complete and publish user friendly summary of tourism perceptions CASE PhD work	High	Spring 2014	ENPA / Exeter Unit	£4k p.a. secured from ENPA
	Work with partners to implement a monitoring survey of the impacts of Hinkley on tourism	High	Ongoing	HTAP, WSC, SCC	Initial S.106 funding
	Work with partners to develop research on the Cool EU funded tourism project	Mid	To Spring 2015	SCC, WSC, ENPA, ETA	EU Interreg funding secured
	Consider, and where appropriate respond , to consultations on matters such as planning, protected area management and tourism support.	Mid	As required	ETP	In house provision
3B - Operate as an effective, influential and respected tourism partnership	Hold a minimum of 4 ETP meetings a year	High	Annual	ETP	Existing budget
	Hold a minimum of 4 ETP marketing sub-group meetings a year	High	Annual	ETPMG	Existing budget
	Develop ETP Action Plan, coordinating partner actions, funding and resources	High	Ongoing	ETP	Existing budget
	Undertake regular reviews of progress against planned actions in the action plan	High	Review twice a year, major mid term review Spring 2015	ETP	Existing budget
	Work with partners to reduce duplication where possible (e.g. consider joint annual tourism conference and marketing initiatives)	High	Ongoing	ETP	Potential cost savings to be made.
	Represent the area at key regional and national events.	Mid	Ongoing	ETP	Secure from existing budgets
	Seek to secure necessary resources to deliver action plan	High	Ongoing	ETP	
	Keep abreast of further funding opportunities and submit applications as appropriate	Mid-High	Ongoing	ETP	Secure from existing budgets

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resources required
	Maintain relationships with and provide feedback from other bodies, such as Devon Tourism Partnership and South West Tourism Alliance	Mid	Ongoing	ALL	Secure from existing budgets
3C - Take joint leadership on key issues affecting the industry and support wider sector projects	Seek lead body recognition from Visit England	High	Spring 2013	ETP	No cost
	Maintain liaison role between industry and EDF Energy	High	Ongoing	WSC, HTAP	S. 106 funding
	Work with partners on Hinckley Tourism Action Partnership to develop strategy and action plan and ensure maximum benefits for area	High	Ongoing	WSC, ENPA, ETA	Initial S.106 funding
	Work with partners on the EU funded Cool tourism project to ensure maximum benefits for area	Mid	To Spring 2015	SCC, WSC, ENPA, ETA	Interreg funding secured
	Support local projects and initiatives by local organisations that seek to benefit the economy (e.g. Watchet Sea Wall project, Exmoor Guinea, Somerset Art Weeks)	Mid	Ongoing	ETP	Funding to be secured on case by case basis
3D - Consult & Engage with stakeholders	Deliver at least one annual ETP e-newsletter	Mid	Annually	ETP	Up to £1k required for hard copy distribution.
	Promote and support partner trade e-newsletters	Mid	Ongoing	ETA, ENPA, WSC, ND+	Secure from existing budgets
	Review how ETP communicates with trade	Mid	Ongoing	ETP	Staff time only
	Develop greater links between the ETP trade site and Visit Exmoor site to encourage trade to make greater use of the Visit Exmoor site with customers.	Mid	Ongoing	ETP	Staff time only
	Develop new content for trade as part of website strategy	Low	2014	ETP	Secure from existing budgets
	Foster stronger links with the wider Exmoor tourism Network of associations and groups, setting up an annual or biennial 'Think Tank' of key tourism stakeholders to discuss issues and opportunities	Mid	Annually	ETP	Minimal budget for venue hire and refreshments

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resources required
	Representation and regular updates to ENP Parish and Consultative Forums and WSC Area Panels.	Mid	As invited – annually	ENPA / WSC	Staff time only
	Maintain effective relationships with local press and media, regularly updating on ETP activities.	Mid	As appropriate	ETP	Staff time only

Objective 4:

To support individual tourism businesses by all possible means and help build the capacity of the tourism industry and wider sector, encourage quality, training and networking, and help maximise the potential of trends and opportunities in order to enhance business profitability and support sustained industry growth.

Success indicators:

- No. of events held
- Attendance at core events
- % of businesses with access to Superfast broadband
- Updates circulated
- ETA Membership
- Business profitability

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource required
4A - Industry / sector networking	Host annual Exmoor Exchange	high	Annually – Spring	ETA	Fees to cover costs
	Hold AGM to facilitate member engagement and debate	High	Annually – Spring	ETA	ETA membership fees to fund
	Host annual Exmoor Tourism Conference	High	Annually – Autumn	ETP (lead to rotate annually)	Delegate fees to cover costs
	Attend local shows to facilitate local networking	Low	Annually	ETA	Funding to be secured
	Facilitate online discussion forum	Mid	Ongoing	ENPA / WSC	Minimal staff time only
	Develop greater links with local and thematic tourism associations (the Exmoor Tourism Network)	Mid	Annual contact with each group	ETP	Staff time only
	Consider feedback on emerging industry issues as feedback	High	Ongoing	ETA	Staff time only
	Work with partners to develop new business networks as part of EU funded COOL project	Mid	To Spring 2015 initially	ETA	Interreg funding only
4B - Promote the concept of quality within the industry	Arrange 1 seminar / workshop to explore the concept of quality each year	Mid	Annual	ETA	Delegate fees to cover costs
	Support delivery & promotion of LIST local inspection scheme	High	Ongoing	ETA / ND+	Fees to cover inspection costs

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource required
	Consider new and emerging forms of quality assurance and incorporate into promotional policies as appropriate (e.g. user reviews)	High	Ongoing	ETA, ND+	Staff time only
	Provide a last resort channel to respond to visitor complaints	High	Ongoing	ETA	Staff time only
	Develop and promote benefits of quality assurance and grading schemes to increase awareness	Mid	Ongoing	ETA	Staff time only - any events to charge delegate fee if required.
4C - Provide and promote training in accordance with industry needs	Provide legal helpline to members.	Mid	Ongoing	ETA	Secure from existing budgets
	Signpost industry to relevant training courses and opportunities	Mid	Ongoing	ETP	Within existing work
	Deliver effective tourism training courses meeting industry needs	Mid	Ongoing	ND+	Secured Leader 4
	Identify training gaps and seek to fill by working closely with partners and wider economic partners (e.g. Somerset Chamber)	Mid	Ongoing	WSC, ND+	TBC
	Promote tourism & hospitality as a good career choice and encourage apprenticeship uptake	Mid	Ongoing	ND+, ENPA, WSC	Through National Apprenticeship Scheme and ENPA Partnership Fund.
	Support work of authorities in identifying barriers to work and developing initiatives to get people into tourism related education or work (e.g. College courses, apprenticeships)	Mid	Ongoing	ENPA, SCC, ND+, WSC	Funding to be secured where required
4D - Facilitate business support and infrastructure requirements	Provide links to resources to enable businesses to adapt to climate change and increased extreme weather events	Mid	Ongoing	ENPA / SCC via Climate South West	Within existing work
	Support and help facilitate roll out of Superfast broadband via connecting Devon and Somerset and Superfast Exmoor projects including advice, training and guidance for all eligible businesses in the area.	high	Roll out to begin mid 2013	SCC, DCC, ENPA, ND+, WSC	Funding package secured for Connecting devon and Somerset. Stage 1 application to rural communities Broadband Fund passed for Superfast Exmoor
	Work with partners to structure and deliver broadband training for tourism businesses via COOL Project	Mid	To 2015	SCC	EU Interreg funding secured
	Promote innovation opportunities to businesses	Mid		SCC	Secured via Innovation project

Strategic Activity	Targeted Actions	Priority	Timetable	Delivery Partners	Resource required
	Support local business mentoring projects	Mid-High	2012-13	WSC, ND+	Current initiatives funded through Local Action
	Advise and support businesses in relation to Hinkley business opportunities (e.g. supply chain and accommodation service)	High		WSC, SCC	Initial S.106 funding
	Support retail schemes and projects (e.g. Local shop scheme, Watchet Markets, Minehead Farmers Markets)	Mid	Ongoing	WSC	Funding to be secured as required for individual projects
4E - Build the capacity of the industry	Promote ETA membership in core ETP activities, outlining membership benefits	High	Ongoing	ETP	Within existing work
	Provide 1:1 business advice to all members as required	Mid	Ongoing	ND+ / ETA	Through membership fees
	Develop, implement and review ongoing ETA business plan	High	Ongoing	ETA	Plan aims to make ETA more financially sustainable
	Review membership fees and benefits to ensure sustainable growth of ETA as leading body	High	Spring 2013	ETA	Within existing work
	Develop and distribute a marketing advice sheet for local event organisers to maximise the value of local events. guidelines	Mid	Spring 2013	ETPWG	Staff time only
	Develop capacity of Minehead Events Group to deliver an annual events programme and encourage similar practice across the area.	High	Ongoing	WSC / MEG / ETP	Funding to be secured as required for individual projects
	Support local groups, such as Minehead Vision Group and Watchet 2025 to deliver actions	Mid	Ongoing	ETP	Funding to be secured as required for individual projects

E. Further information

The following provides some useful sources of information in connection to tourism on Exmoor.

Exmoor Tourism Partnership:

- Governance Arrangements (revised Sept 2012)
- Exmoor Brand Guidelines
- News and general support information for tourism

www.exmoortourismpartnership.org.uk

Exmoor National Park Authority:

- Annual State of Tourism reports – including STEAM assessment of volume and value of tourism to the National Park and Greater Exmoor.
- Visitor and non-visitor surveys
- Business surveys
- General information for tourism providers.

www.exmoor-nationalpark.gov.uk/communities/tourism-trade

West Somerset Council:

- Economic strategy – Responding to change 2011.
- Hinkley Point supply chain
- General business support information.

<http://www.westsomersetonline.gov.uk/Business>

Exmoor Tourist Association:

- Membership information
- Media centre
- Marketing opportunities
- General visitor information

www.visit-exmoor.co.uk (Business relevant information found using links at bottom of the site)

North Devon+:

- Membership information
- Media centre
- Training and marketing opportunities
- General business support

www.northdevonplus.com (Some information restricted to members only)

Appendix 1

Exmoor Marketing Strategy 2012-2014

Exmoor Tourism Partnership – Strategic Marketing Plan 2011-2014

1. Introduction

The Exmoor Tourism Partnership's (ETP) core organisations are West Somerset Council, Exmoor National Park Authority and the Exmoor Tourist Association. The ETP works with key partners to promote Greater Exmoor and West Somerset. The role of the Partnership is to enhance the quality of the visitor experience, to improve the viability, sustainability and performance of tourism enterprises and to develop, promote and brand in appropriate markets. Exmoor National Park's STEAM Report 2010 states tourism is the largest single component of Exmoor's economy, valued at £85 million per year or £203m for the Greater Exmoor area (which includes West Somerset, the Quantock Hills and parts of N Devon).

ETP Aims

To develop Greater Exmoor (including West Somerset and North Devon) as a leading tourism destination based on quality and sustainable experiences supporting an enhanced economy.

ETP Objectives

- To increase domestic and international visitor numbers, length of stay and visitor expenditure by positioning the area along with its tourism products and experiences as a distinct and competitive tourist destination
- To build on the destination's position as a leader in sustainable tourism, managing tourism to conserve and enhance the special qualities of the area that underpin the tourism product
- To take a leadership role in the tourism industry, encourage professional standards and the development of co-operative arrangements, which build and maximise industry effectiveness
- To consult, communicate and engage with stakeholders in the public and private sectors, operators and the community to encourage collaborative action and commitment to the tourism success of the area
- To co-ordinate any delegated resources and financial contributions of partners in support of the delivery of the tourism strategy and seek to raise additional external funds to achieve the objectives

- To operate as a viable, innovative and professional partnership to achieve the objectives to the benefit of members, stakeholders and the area
- To support the private enterprise stakeholders in the tourism industry by all possible means to enhance their profitability

2. ETP Marketing Objectives 2011- 2014

1. To underpin the area's main economic driver, tourism, by:
 - a. increasing the value of staying visitors across the district by 5% per year
 - b. increasing the value of day visitors across the area by 5% per year
 - c. increasing the number of activities' uptake by 5% per year
 - d. increasing the number of international visitors by 3% per year
 - e. increasing the number of younger visitors by 4% per year
2. To underpin the area's position as a leader in sustainable tourism by:
 - a. increasing awareness of the special environment to help ensure its future conservation
 - b. increasing visitor buy-in to help protect and enhance the environment
 - c. increasing visitor uptake of sustainable projects/initiatives
 - d. increasing the number of accredited green tourism operators
 - e. increasing creative and technology-based approach to area marketing
3. To increase capacity within the private sector so that it can promote the special qualities of the area in line with the government's Localism Bill by:
 - a. undertaking discrete pieces of work to increase revenue
 - b. promoting the industry to increase membership numbers
 - c. enhancing marketing skills in the private sector
 - d. enabling the industry to increase its paid resource
 - e. providing a legacy of sustainable marketing initiatives

It is recognised that the targets stated under objective 1 are particularly challenging in the current climate. As stated in the summary (section 7) just to maintain visitor numbers will likely require an increase in market share. However they correspond to the national targets set out in the Coalition Governments Tourism strategy which will allow us to benchmark performance against the country as a whole, and other areas within.

3. Situational Analysis – Macroenvironment: PESTLE Analysis

Political

- Public spending cuts
- Reduction in human resources in local government
- Localism Bill
- Nuclear new build
- Government tourism strategy 2011

Economic

- UK slowly emerging from recession
- Growth in the private sector
- Green taxes on air flights/fuel
- Interest rates remain low to stimulate spending
- VAT increased by 2.5%
- Olympic Games
- Formation of Local Enterprise Partnerships (LEPs)

Socio-cultural

- The highest population of elderly people
- Migration of younger people out of the area
- Shift in consumer visiting patterns to favour 'staycations'
- Increasing awareness of travel carbon footprint

Technological

- Rise in numbers of people looking at and booking holidays on line
- Social networking influencing
- Superfast Broadband coming to Somerset and Devon
- I-pads and phone apps

Legal

- Climate change legislation
- Localism Bill

Environmental

- Increasing market demand for 'green' tourism
- Potential travel scares eg health risks/volcano dust/terrorism

4. SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Unique unspoilt environment • Proximity to south east/Midlands • Good range of outdoor activities • Recent regen in West Somerset • Sustainable/green agenda • Wide range of accommodation • Breadth of offer – moor/coast/history/heritage/wildlife • Destination defined by visitor offer not administrative boundaries • Effective partnership working between public and private sectors 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Lack of national awareness • Lack of brand identity • Few visitors realise proximity • Poor transport links • Poor public transport • Ageing visitor demographic • Lack of indoor attractions • Some failure to ‘move with the times’ • Lack of hire equipment
<p>Opportunities</p> <ul style="list-style-type: none"> • Increased interest in green holidays • Low interest rates • Good partnership working • Olympics 2012 • Green transport initiatives • Healthy living agenda • UK National Park family branding/marketing initiatives • Hinkley Point 	<p>Threats</p> <ul style="list-style-type: none"> • Rising fuel prices • Fear of job losses • Failure to attract younger visitors • Public spending cuts • Lack of capacity in the private tourism sector • Failing to adopt new marketing techniques • Lack of funding hinders ongoing partnership working • Hinkley Point

5. Market Analysis

Local market snapshot

Market shape and dynamics	<ul style="list-style-type: none"> • <i>2009 STEAM figures</i> <ul style="list-style-type: none"> ○ <i>Exmoor National Park: 1,125,000 day visitors, 255,000 staying visitors – average length of stay 3.7 days</i> ○ <i>Greater Exmoor: 1,126m day visitors, 712,000 staying visitors – average length of stay 4.8 days</i> • Age of visitors in ENPA's Visitor Survey 2010:: 16-24 yrs 5%; 25-44yrs 27%; 45-64 yrs 47%; 65+yrs 21%.
Product/Market fit	<ul style="list-style-type: none"> • Environment/tranquillity/history/heritage/outdoor activities/green tourism/ events and festivals
Demographics/potential consumer segments	<ul style="list-style-type: none"> • Traditionals • Discoverers • Followers
Area segments <ul style="list-style-type: none"> • Exmoor • West Coast • Quantocks 	<ul style="list-style-type: none"> ⇒ Traditionals and Discoverers ⇒ Traditionals and Followers ⇒ Traditionals and Discoverers

Market overview

- A driving theme since 2008 has been the global recession. Since 2010, the government has been overseeing an austerity drive that has led to significant cuts to public sector budgets and job losses. With further annual cuts lasting at least until 2015, there is ongoing uncertainty in the public sector. However, recent figures show employment growth in the private sector but economic value and stability has yet to be ascertained
- During the 12 months to April 2011, the number of visits by overseas residents to the UK increased by 3% when compared with the 12 months to April 2010, from 29.3 to 30.3 million – an increase of 1.0 million. Visits for business reasons increased by 7 per cent;

holiday visits increased by 6 per cent; visits to friends or relatives increased by 1 per cent. Visits to the UK by residents of

- Europe increased by 3 per cent, from 21.6m to 22.4m
- North America fell by 1 per cent, to 3.4m
- other parts of the world increased by 6% from 4.2m to 4.5m^[1]

^[1] Source: Office for National Statistics. Figures not seasonally adjusted.

- Nationally, the number of UK domestic overnight trips was 119.3m, a decrease of 5.2% in the 12 months to December 2010. Domestic overnight trip spending was £20.8 billion, a decrease of 4.9% in the 12 months to December 2010.^[2]
- Exmoor National Park's Tourism Business Survey 2010 revealed that in the preceding 12 months 30% of respondents felt their business had increased (23% by more than 10%), 33% of respondents said their business remained static, while 36% said their business had decreased (19% said business decreased by more than 10%).
- The survey also revealed that the majority of Exmoor's overseas visitors came from Germany (74%), the Netherlands (61%) and joint third were France and the United States (21%).

^[2] Source: VisitBritain

Competitor destinations

In terms of holidays the direct competition nationally is, paradoxically, other national parks. While new 'iconic' branding for the National Park 'family' and joint family marketing initiatives are designed to raise awareness of the important role of national parks and their aims, Exmoor is starting from a low base. Currently it receives the third lowest number of visitors out of the UK's national park family.

To put some context to this, Exmoor has not had the benefit of multi-generational PR exposure, for example, Yorkshire being the setting for 'All Creatures Great and Small', 'Heartbeat' and 'Emmerdale'. In recent years Yorkshire has also received significant tourism

funding through its Regional Development Agency ten times that available in the South West.

Exmoor is also a comparatively small park so its visitor offer may be perceived as less than other national parks. Other smaller national parks, for example, the New Forest, have the benefit of being en route to one of England's traditional tourism hotspots – a ferry to the Isle of Wight is based at Lymington – so visitors experience the charms of the park and are more likely to return as visitors to the park itself.

Dartmoor is also on the main holiday route to Cornwall so visitors are more likely to know of it and therefore return to visit it. Dartmoor is also relatively small but benefits from day visitors from nearby cities, such as Exeter and Plymouth and nearby large towns. Likewise, the New Forest is close to cities and large towns.

In addition, Exmoor has strong competition from westerly locations that have benefited for large marketing budgets through European funding. Cornwall and Wales are two examples with Welsh national parks being 'knock-on' beneficiaries.

South coast resorts are also traditional strongholds for summer holidays, as well as being direct competitors in the day trip market. Exmoor does not have the good transport links and public transport services that are prevalent in the more built-up coastal resorts.

To some extent this is what makes Exmoor's main selling points and helps to conserve the top two reasons visitors cite for coming to Exmoor – scenery and landscape (91%) and tranquillity / peace and quiet (79%).

The key to future success

The Exmoor Tourism Partnership has embraced Exmoor's special qualities and integrated them into its aims and objectives. The ETP ethos is streamed through its subgroups - the Brochure Working Group, The Website Working Group and the Marketing Group – all of which comprise the public sector working in partnership with individuals and organisations with a vested interest in tourism from the private sector.

By uniting public and private sector budgets marketing in the 2010/11 ETP marketing plan the groups successfully re-tendered existing contracts saving significant sums of money on

existing contracts. For example, the costs of hosting the Visit Exmoor website were £6,000 pa but will be £600 in future. The partnership levered in £10,000 external funding for a new and improved website which will be launched this month with additional funding from Western Somerset Local Action for Rural Communities fund. .

As well as achieving economies of scale, the marketing plan has established a strategic objective to promote the whole area as a distinct brand, regardless of administrative boundaries, in order to maximise benefits to the whole local economy and in line with the Coalition Governments Tourism Strategy (2011).

The key to ongoing success is security for future ventures that unite private and public sector organisations to maximise economic benefits while minimising the environmental impacts to help conserve the area's main selling points.

6. Target markets, objectives and tactical overview

1. To underpin the area's main economic driver, tourism, by:

Target Market	Objectives	Tactics	Performance indicator
Empty nesters DINKS (Dual Income No Kids) Caring Parents	Increase value from staying visitors across the area	<ul style="list-style-type: none"> • PR • IT • Advertising • Shows 	<ul style="list-style-type: none"> • STEAM Report • IT – unique visitor recording
	Increase value from day visitors across the area	<ul style="list-style-type: none"> • PR • IT • Shows 	<ul style="list-style-type: none"> • STEAM Report
	Increase number of activities' uptake	<ul style="list-style-type: none"> • PR • IT • Advertising 	<ul style="list-style-type: none"> • ENPA Visitor Survey • STEAM Report
	Increase number of international visitors by 3% per year	<ul style="list-style-type: none"> • International PR • IT 	<ul style="list-style-type: none"> • ENPA Visitor Survey / STEAM Report • Foreign Facebook friends
	Increase number of younger visitors (below 45) 4% per year	<ul style="list-style-type: none"> • IT • Brand identity 	<ul style="list-style-type: none"> • ENPA Visitor Survey • Twitter follower numbers • Facebook friend numbers • Brand development

2. To underpin the area's position as a leader in sustainable tourism by:

Target Market	Objectives	Tactics	Performance indicator
All visitors	Increase awareness of the environment	<ul style="list-style-type: none"> • IT • PR • Printed information • Branding linked to special environment 	<ul style="list-style-type: none"> • ENPA Visitor Survey • ENPA Tourism Business Survey
	Visitor buy-in to protect/enhance the environment	<ul style="list-style-type: none"> • IT • PR • Printed information 	<ul style="list-style-type: none"> • ENPA Visitor Survey • STEAM Report • Indicators relating to specific initiatives (e.g. CareMoor and Exmoor Unplugged).
DINKS Caring parents	Uptake of sustainable projects/initiatives	<ul style="list-style-type: none"> ▪ IT ▪ PR 	<ul style="list-style-type: none"> ▪ Hits on sustainable web pages
Private Sector tourism industry	Increase number of tourism operators gaining green tourism awards	<ul style="list-style-type: none"> ▪ Education and incentives ▪ IT ▪ PR 	<ul style="list-style-type: none"> ▪ Number of tourism operators gaining green accreditation per annum
	Decrease number of unsustainable marketing methods employed	<ul style="list-style-type: none"> ▪ IT 	<ul style="list-style-type: none"> ▪ More IT-based applications ▪ Measure web traffic

3. To increase capacity within the private sector so that it can promote the special qualities of the area by:

Target Market	Objectives	Tactics	Performance indicator
Local tourism industry	Increase private sector revenue	<ul style="list-style-type: none"> ▪ Develop a business plan in partnership with ETA ▪ Increase visitor numbers 	<ul style="list-style-type: none"> ▪ Business Plan with SMART targets ▪ STEAM report
	Increase ETA membership	<ul style="list-style-type: none"> ▪ PR campaign ▪ IT-based campaigns ▪ Printed information 	<ul style="list-style-type: none"> ▪ Number of ETA members increased ▪ Increased revenue from membership
	Private sector-led marketing	<ul style="list-style-type: none"> ▪ Provide the private sector with market intelligence 	<ul style="list-style-type: none"> ▪ Intern employed to provide market intelligence
	Increase paid resource in the private sector tourism industry	<ul style="list-style-type: none"> ▪ Increase revenue 	<ul style="list-style-type: none"> ▪ Number of directly and indirectly employed hours
	Increase number of sustainable marketing initiatives	<ul style="list-style-type: none"> ▪ Develop appropriate market-led IT applications 	<ul style="list-style-type: none"> ▪ Number of IT-based applications

7. Tourism marketing action plan

In order to develop a three-year marketing strategy, core ETP partners and marketing group members have completed consultation feedback forms giving their views on how best to promote the area in coming years in light of technological innovations and visitor feedback via visitor surveys. Research has been undertaken on national and international visitor trends.

The two longest-standing methods of area promotion, the website and brochure, drew an equal number of responses, although the website was ranked a higher priority for coming years.

The top four traditional promotional methods supporting website and brochure activities were:

1. PR in national media
2. PR in regional media
3. Presence at national trade and industry shows
4. Adverts in specialist national press

The top four electronic promotional methods were:

1. Search engine optimisation
2. Specific e-marketing campaigns
3. Online PR
4. Social media such as Facebook and Twitter

Points raised at meetings and by consultation respondents were the limited time of skilled resource available to market the area and growing financial constraints.

The current and ongoing budget and staff reductions in the public sector are forcing the ETP to look closely at its existing activity. The ETP recognises that finance in the public sector is also suffering in line with the global economy. While the plan aims to increase revenue so that resource can be employed and the industry can take on more of its marketing activity, it recognises that it will take time to build the necessary capacity.

Consequently, there is a need physically and financially to move to online communications activity. This is in line with both Exmoor National Park's and West Somerset Council's commitment to more sustainable environmental practices.

This also ties in with national trends, which evidence that visitors are increasing depending on IT-based applications to obtain information on destinations.

The Exmoor Visitor Survey 2010 established that 69% of new visitors obtained information from the internet prior to visiting. First time visitors' second main source was friends/relatives (35%) followed by printed brochure/guide (12%).

Visit Britain figures published in July 2011 shows that seven out of 12 European markets covered rate the internet as the most important source of information when choosing holidays. The internet was the first choice with markets in Germany (31%) and the Netherlands (42.5%), which are Exmoor's main foreign visitor markets. Both markets stated friends/relatives' recommendations as the second source of information (26% in Germany and 19% in the Netherlands respectively), personal experience third (Germany 17% and the Netherlands just over 15%). Non-commercial printed guides were just above 5% in the Netherlands and below 5% in Germany.

While the area has a good track record of producing a high quality guide, the costs of distribution have escalated significantly in recent years, a trend that seems set to increase. With the rise in demand for online information, the number of brochures produced in 2012 will be reduced from 65,000 to 50,000. This is also in line with the ETP objectives of moving to more sustainable promotional practices.

While local distribution has been curtailed this year as the guide's primary aim is to attract visitors to the area, not provide a glossy guide when here, work needs to be completed with the industry to establish how currently available publications and leaflets can be better used to avoid unnecessary and expensive duplication.

Overarching strategic actions are to:

- employ a marketing graduate intern to identify how best to exploit new and existing national and international markets via IT-based applications
- undertake telemarketing surveys to establish non-visitor habits and views of Exmoor
- develop appropriate IT-based visitor marketing tools based on customer demand
- increase social media and online presence
- ensure search engine is optimised
- ensure printed material meets visitors' needs

- increase national and regional PR
- support trade and industry shows
- develop specific email campaigns
- advertise in specialist national press
- develop a distinct brand

Summary

Despite a renaissance in 'staycations' in recent years, the government's current austerity drive may affect domestic visits as the UK continues to struggle to recover from the global economic crisis.

As the area's main economic driver is tourism, local communities and the local economy as a whole are likely to suffer as a result unless action is taken to raise the area's profile as a distinct visitor destination in the UK. Exmoor needs to increase its market share if it is to sustain current visitor numbers and further proactive work must be undertaken to increase numbers.

The day visitor market has a vital role to play in supporting the local economy but its promotion has not been a focus for particular attention in recent years. Work needs to be undertaken urgently if the area is to compete with adjacent destinations. The national healthy living agenda should be a prime consideration along with enhanced PR support for events and festivals.

Exmoor can capitalise on the National Park family's branding and marketing initiatives to promote itself to national markets. However, its low ranking as a park visitor destination and its remoteness from major tourism routes means that local action is needed to ensure it is recognised as a unique visitor destination. Brand development should be an intrinsic part of raising Exmoor's profile and making it a recognisable and memorable brand in its own right.

The ETP is mindful that Exmoor's special qualities are its main selling points and due caution must be taken to ensure these are not undermined. Therefore, the strategy, which will be underpinned with annual marketing plans, aims to champion the destination to appropriate audiences as a leader in sustainable tourism.

Budget

A draft budget has been drawn up, and will be subject to the resources secured. This is commercially sensitive. As a three year plan flexibility will be required to respond to the latest trends and thus move some funding between headings. It is also anticipated that additional funding will be secured to aid the delivery of the strategy and this will influence direct outputs to some extent. In particular there are options to maximise industry contributions to the strategy through its delivery (e.g. advertisements in e-newsletters etc).

Detailed marketing action plans will be drawn up annually by the ETP Marketing Group, and agreed by the ETP core group (and funders if required).

