



## Exmoor Destination Marketing Strategy 2015-2017

### Vision

To successfully market the area as a leading **rural destination** for **year-round countryside, heritage** and **adventure activities**.

We aim to build on recent successes to grow the economic impact of staying visitors by £10m by 2017, equating to a 5% increase in value, focusing on attracting new domestic audiences in the shoulder seasons. .

### Recent Trends

Considering the Greater Exmoor area (all of the National Park, West Somerset district and all other parishes within 10miles of the NP boundary into N and Mid Devon) tourism over the last 5 years has held its own. Comparing 2014 with 2009 actual visitor numbers have dropped slightly (-1.4%) but equivalent visitor days grown (+1.9%) demonstrating a further growth in shorter breaks<sup>1</sup>. In terms of the value of tourism the economic impact has risen by 24.7% from £202.77m in 2009 to over £252.82m. Allowing for inflation this equates to a real increase of 3.7% over a period of credit crunch, recession, increased overseas competition and several wet summers.

There is a marked difference between the trends for day visitors and staying visitors:

	Visitor Days (m)			Economic impact (£'s m - index linked)		
	2009	2014	% change	2009	2014	% change
<b>Day Visitors</b>	1.13	1.01	-10.2%	39.09	35.10	-10.2
<b>Staying visitors</b>	3.42	3.60	+5.2%	204.82	217.72	6.3

The average economic impact in 2014 of a day visitor is £34.71 compared to £60.51 for a staying visitor.

Links to further research concerning tourism on Exmoor can be accessed here:  
<http://www.visit-exmoor.co.uk/trade/research>.

### Focus & Rationale

With limited budgets it is impossible to be all things to all people. In focusing on staying visitors we are likely to see the greatest financial returns (see average spend figures below) and domestic campaigns aimed at staying visitors will also help to showcase indirect the area's potential for day visitors. Staying visitors generally benefit the whole of the visitor economy, whilst day visitors will not benefit accommodation providers who are the

<sup>1</sup> Visitor Days - the number of days visitors spend in an area. E.g. 1 visitor staying 3 days = 1 visitor number, 3 visitor days

majority of Exmoor Tourism members. Attractions, food and drink providers and others will arguably benefit more from staying visitors than day visitors too.

The strategy focuses on ET directly targeting domestic tourism. Overseas tourism is growing but still represents the minority of visits (5% of all visitors in 2010, 8% in 2014) and other initiatives are aimed at stimulating this market further. The current ET budgets are not sufficient to have meaningful impact at this level. However some staff resource (through ET and / or partners) should be maintained to ensure Exmoor benefits from other initiatives targeting the overseas market.

In addition to targeting staying visitors the marketing work of Exmoor Tourism will focus primarily on specific target audiences (see below), whilst supporting partners to deliver activity to other key audiences which will benefit the area.

Many of the key challenges to the area (unreliable weather, relatively less accessible than similar areas should be addressed in marketing activity as appropriate. Often these factors although challenges can present real opportunities considering our target audiences (promoting tranquillity, outdoor activities, unique distinctiveness etc.).

Campaigns should utilise and build upon recent work to develop the Exmoor brand as an overarching attack brand encompassing and delivering benefits across the area including the Quantocks, National Park and Coastal areas. <http://www.visit-exmoor.co.uk/trade/exmoor-brand-guidelines>.

## Resources

Budget allocations will be agreed annually by Exmoor Tourism. This is specific funding for marketing of the area and may be drawn from membership income, sponsorship and other sources in addition to any support from West Somerset Council and Exmoor National Park Authority. Future budgets will require greater industry input.

There will be some in kind support from Local Authority staff but ET will be responsible for delivery of the campaign. Given current capacities are limited it may be deemed preferable to outsource delivery to an agency following a tender process.

Every opportunity should be taken to expand this relatively small budget – this can include further industry contributions through on-selling of Exmoor branded promotions (e.g. we buy a full page advert, promote the area and sub sell 50-75% of the space to relevant business providers), increasing membership by demonstrating successful marketing activity, corporate sponsorship etc).

It is important to consider that Exmoor Tourism is not working alone. Other organisations / initiatives that will help to support the visitor's economy of the area include:

- Collective overseas marketing of the South West through the **South West Tourism Challenge Fund**.
- **Collective marketing of National Parks through UK National Parks** including partnership agreements with Visit England (domestic) and Visit Britain (overseas) and activities such as National Parks Week. A current example is the multi million £ Countryside is GREAT campaign led by Visit Britain featuring National Parks as key attractors to the British countryside.
- **Marketing initiatives of neighbouring / overlapping** organisations including Somerset Tourism Association and North Devon Marketing Bureau

- The work of partners, including ET, in utilising S.106 funds to ensure the visitor economy continues to develop during the construction of Hinkley Point C via the **Hinkley Tourism Action Partnership**.
- **Work of constituent organisations in their own right** such as that undertaken by ENPA and WSC. For example West Somerset Council is involved in hosting Coastal Community Teams and ENPA is appointing a part time (2 year fixed contract) Social Media and Marketing Officer to help promote the National Park and the work of the Authority to a range of audiences.

## Available tools

In addition to any budgets for new work the following tools are available to be use as appropriate to further the strategy:

- An increasingly popular web platform at [www.visit-exmoor.co.uk](http://www.visit-exmoor.co.uk) with opportunities for blogs and bespoke content creation, including blog and trade sub-site
- 60 top Exmoor experiences on website
- Development of 50 Somerset and Exmoor secrets by HTAP PR agency
- A range of short web videos including 2 successful TV commercials and tourism experiences web videos – available at [www.youtube.com/exmoornp](http://www.youtube.com/exmoornp).
- Twitter account (c.3774 followers) and Facebook page (c.546 likes). Interaction from others such as Exmoor NP, UK National Parks, HTAP PR agency etc. help provide a significantly larger reach.
- Image libraries at [www.flickr.com/exmoorNP/albums](http://www.flickr.com/exmoorNP/albums) and [www.flickr.com/visit\\_exmoor/albums](http://www.flickr.com/visit_exmoor/albums)
- Consumer database of c.10,000 contacts.

## Target Audiences

Exmoor is already a popular destination and appeals to many audiences. To maximise our investment however ET needs to focus marketing investment on those audiences with the greatest potential for growth, as measured in value (rather than volume). As highlighted above the domestic overnight trade is likely to be our biggest growth audience focusing on the following three key audiences:

Bill & Margaret Couple in their 50's (early active retirees or working) – <b>Countryside lovers</b>	Diana & Keith Retired couple – <b>Heritage seekers</b>	Sam & Beth Young couple – <b>Adventure seekers</b>
Enjoy countryside walks of up to 3-4hours, ideally with a nice pub lunch along the way and an opportunity to view wildlife.	Enjoy the finer things in life – good food and views! They take short countryside strolls and enjoy heritage and the arts.	Like to try new outdoor activities such as off road cycling, stand up paddleboarding, coastering etc. and will always invest in the latest kit!
Live in the home counties, traditionally taking 1 week UK holidays in destinations such as the Lake District and the Peak District. Middle class but price conscious.	Live along the M5 corridor, having been high earners they previously took several overseas trips but now prefer to avoid the hassle of the airports and to stay closer to home	Live in central southern England within 2.5hrs of Exmoor and tend to take varied breaks at different destinations to try new experiences / activities. They are not motivated by mass

		market appeals.
As grandparents they spend much of the summer holidays looking after grandchildren, in addition to a 2 week European break.	Time away breaks the routine of daily life and they are likely to take several shorter trips a year. They are influenced more by the quality of the offer than the time of the year.	Not having kids they tend to holiday during term time to avoid busyness and to save costs allowing them to buy new kit or to try new activities.
They would usually opt for a traditional bed and breakfast, or maybe a self-catering cottage for longer periods. Special offers are likely to appeal.	Boutique B&B's or small country house style hotels with an emphasis on good customer service and food.	Life is fast and they're not used to standing still. Holidays are for living outside of the day to day. They would often camp, but would also be attracted to try slightly quirky options like glamping, or the occasional visit to a contemporary bed and breakfast.
National Trust members who read publications such as Country Walking magazine and the Guardian. Also being to organisations such as RSPB and Wildlife Trust.  Having been introduced to facebook to share photos of the grandchildren they are increasingly being inspired by social media in other areas of their life, but still prefer traditional communication methods.	National Trust and wine club members. Occasionally read magazines such as Landscape and daily read the Telegraph.	They read a few things such as trail magazine but predominantly use the internet, and are heavily influenced by social media and will often book online using peer review sites.

Whilst campaign work is expected to target these audiences in its focus it should not be delivered in such a way that it discourages other visitors. Indeed it is hoped that given many Exmoor experiences are cross counting that many outputs will appeal to a wide range of potential visitors.

### **Product / Experience Offer**

The Exmoor area has a strong and distinctive rural offer. Following research and practical campaigns **future work should focus on selling the experiences over and above the destination.**

Resulting campaigns must play to some of our key strengths as a destination, presenting a 'Wow' factor. Crucially these should be targeted to our chosen audiences. The following provides some guidance as to the experiences we can offer throughout the seasons to our three primary audiences but this is by no means exhaustive and intended to offer purely a flavour for the area's offer.

**SPRING – high priority**

**Countryside Lovers**

Lambs / Walking Festival/ Fossil hunting / photography

**Heritage seekers**

Coast Festival / Steam Galas

**Adventure seekers**

Horse Trekking / Road cycling / Coastpath

**SUMMER – low priority**

**Countryside Lovers**

Exmoor Pony Foals / Pony Festival / Country Shows

**Heritage seekers**

Coastal Cruises

**Adventure seekers**

IronMan / Wimbleball / Coasteering / Sea Kayaking / Music festivals

**YEAR ROUND**

**Countryside Lovers**

National Park, AONB and Heritage Coast designations / 1,000 km of rights of Way / 3 Long Distant promoted routes / Dark Sky Reserve

**Heritage seekers**

8000 years of history / Best preserved medical village (Dunster) / 200 scheduled monuments / 4,000 known archaeological sites / Literary Walks / Museums

**Adventure seekers**

Highest cliffs in the country / Exmoor cycle route / 400km of bridleway for MTB / Geocaching

**AUTUMN – high priority**

**Countryside lovers**

Red Deer Rut / Autumn colours / Photography

**Heritage seekers**

Autumn colours / Steam Galas / Food Festivals / Art weeks /

**Adventure seekers**

NT Outdoor festival / Exmoor Beast / Tri the Beast / Mountain Biking

**WINTER – mid priority**

**Countryside lovers**

Snowdrop Valley / Exmoor Ponies wild on the moor /

**Heritage seekers**

Dunster by candlelight & Dulverton by starlight / Snowdrop Valley / Wassailing

**Adventure seekers**

Grade ii - iv white water rivers / MTB /

Products and experiences included above should focus on:

- Relaxation, inspiration, discovery, a touch of romance, new experiences
- A product that focuses on a few key ingredients
- That will give the couple great memories
- It should provide interesting offers and packages (which need developing)

**Implementation**

Strategy and budgets to be approved by Exmoor Tourism executive committee. Development and delivery of annual marketing plans in line with the strategy and within agreed budgets to be delegated to marketing group. This strategy could be used as a basis for a tender for a marketing agency to develop and deliver proposals within our budget.

**AGREED 21 October 2015**