# Northern Devon Tourism Business Survey 2021: report on a baseline survey for nature tourism

University of Exeter | Centre for Rural Policy Research

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## 1. Project context

University of Exeter was commissioned by Torridge District Council in late 2019 to complete a short project involving the design of a baseline survey for nature tourism in the Torridge and North Devon districts of Devon. This research was connected to the building of the new Northam Burrows Visitor Centre, which was due to start in 2020. The vision for the new Burrows Visitor Centre was as a gateway to the UNESCO Biosphere Reserve and North Devon Area of Outstanding Natural Beauty, and as a space for promoting a range of opportunities for nature-based tourism in the region. The research was commissioned to better understand nature tourism in Northern Devon, providing a baseline to measure future change. The survey work was designed to link to other tourism research in the North Devon UNESCO Biosphere Reserve being conducted by the EU Interreg Bio-Cultural Heritage Tourism project.

Unfortunately the research was severely impacted by Covid-19 pandemic. We (University of Exeter and Torridge District Council) were just about to launch the survey in late February 2020, but with the early shockwaves of the pandemic already reverberating through the tourism industry, we took the decision to postpone the launch. In the context of dramatically and rapidly changing circumstances for tourism businesses through 2020 and 2021, we redesigned the survey twice. We took two further decisions to delay the launch of the survey, one in November 2020 (due to Lockdown 2), and another in January 2021 (due to urgent Covid-related tourism business survey work). The survey was redesigned for a final time in June/ July 2021, and was launched in August 2021. We took the decision to launch at this time to link with the opening of the new Burrows Visitor Centre (the original catalyst for the baseline survey), the appointment of a Nature Tourism Officer for Torridge, and to produce results which could inform tourism recovery from Covid.

## 2. Methods

The survey was launched on 12th August 2021 and closed 04th October 2021. The survey was circulated online via social networks and email lists to businesses in Northern Devon, and to a structured sample of 100 tourism businesses in Torridge district by letter by Torridge District Council. The sample of 100 businesses was structured by business type and used the Business Rates contact details. One reminder was sent to those who received a paper version of the questionnaire.

### 2.1. Questionnaire design

The first iteration of the survey was designed by Tim Wilkinson with input from Torridge District Council and North Devon Council. Colleagues at the Centre for Rural Policy Research and on the BioCultural Heritage Tourism project also fed into themes and ideas. This initial version was piloted and feedback incorporated. Subsequent iterations were developed with Torridge District Council.

### 2.2. Research ethics

The research was approved by the University of Exeter Research Ethics Committee (REF 201920-051), and amended to account for Covid-impacts on the timeline. Information about the purpose of survey was included in a cover letter and on a survey landing page (online version).

### 2.3. Number of responses

Of the 100 businesses contacted by letter, we obtained 23 responses. On the online survey 43 responses were received, although 10 of these were submitted as entirely blank surveys. These responses were removed. So there were 56 valid responses in total. Not every respondent answered every question and respondents were free to skip questions if they wished. The sample should not be taken as representative of all tourism business in Northern Devon, and is a snapshot in time. While the results of the research are based on a relatively small sample of tourism businesses they do provide some useful insights, which can inform the development of nature tourism in Northern Devon.

It should be noted that fatigue with questionnaire surveys (particularly online surveys) was fed back by businesses as part of other tourism research in Northern Devon. The pandemic meant that online surveys became more frequent, as they were a Covid-safe way of collecting information. The timing of the survey launch (August) likely contributed to the lower levels of responses too; it was peak season for tourism businesses experiencing high volumes of tourists as the UK moved out of Step 4 of the Covid roadmap. In the lessons learnt section (see Section 3), I reflect on how more businesses might be encouraged to take part in future tourism surveys.

### 2.4. Data entry and analysis

The online survey was hosted on a GDPR compliant platform called *Qualtrics*. Paper responses were entered on the online platform manually. Paper versions were destroyed. Any identifying comments were removed from the data; participants were anonymised. Data analysis was completed on SPSS, with graphs produced on Excel.

## 3. Results

### 3.1. Respondent profile: business size, type, turnover

Businesses who responded to the survey were largely (85%) micro-businesses, employing less than 9 employees (see Figure 1). There were some small businesses (9%), employing 10 to 49 staff. For 63% of respondents, annual business turnover was less than £85,000 (see Figure 2). Some respondents noted that Covid had impacted their turnover. Almost half (48%) of the sample were non-serviced accommodation providers (see Figure 3), but there was representation from serviced accommodation, food and beverage, attractions and activity providers (each comprising c. 10% of the sample). Most businesses completing the survey were well established; 65% had been in business for over 6 years, with a large proportion having been operating for more than 21 years (see Figure 4). There were newer businesses too; about a third (35%) had been open 1 to 5 years.

Overall, the sample is mainly comprised of a range of types of micro- and small businesses in Northern Devon. The sample is largely accommodation providers; although other types of tourism business are represented.

*Figure 1. Number of staff employed. N=53.*

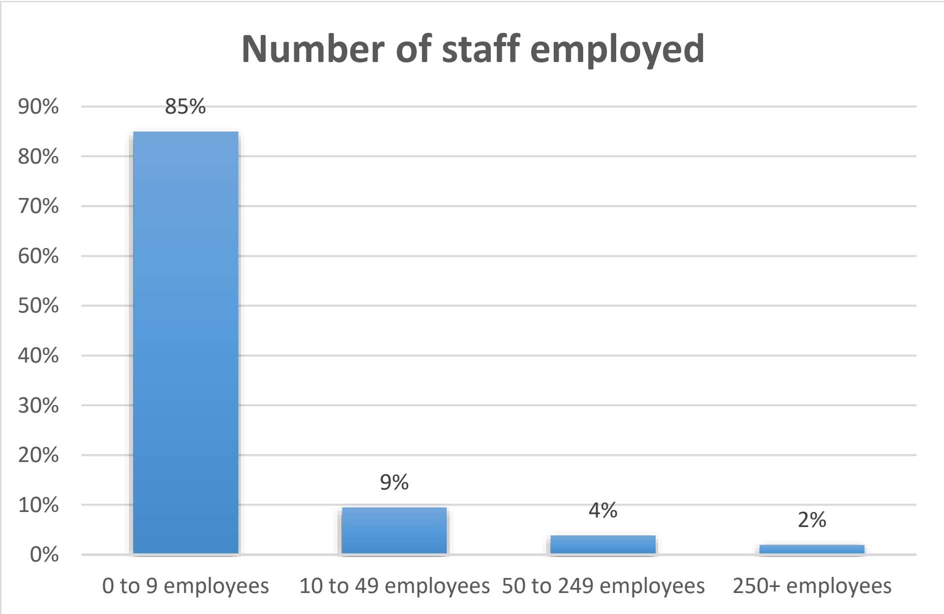


*Figure 2. Business Turnover. N=51*

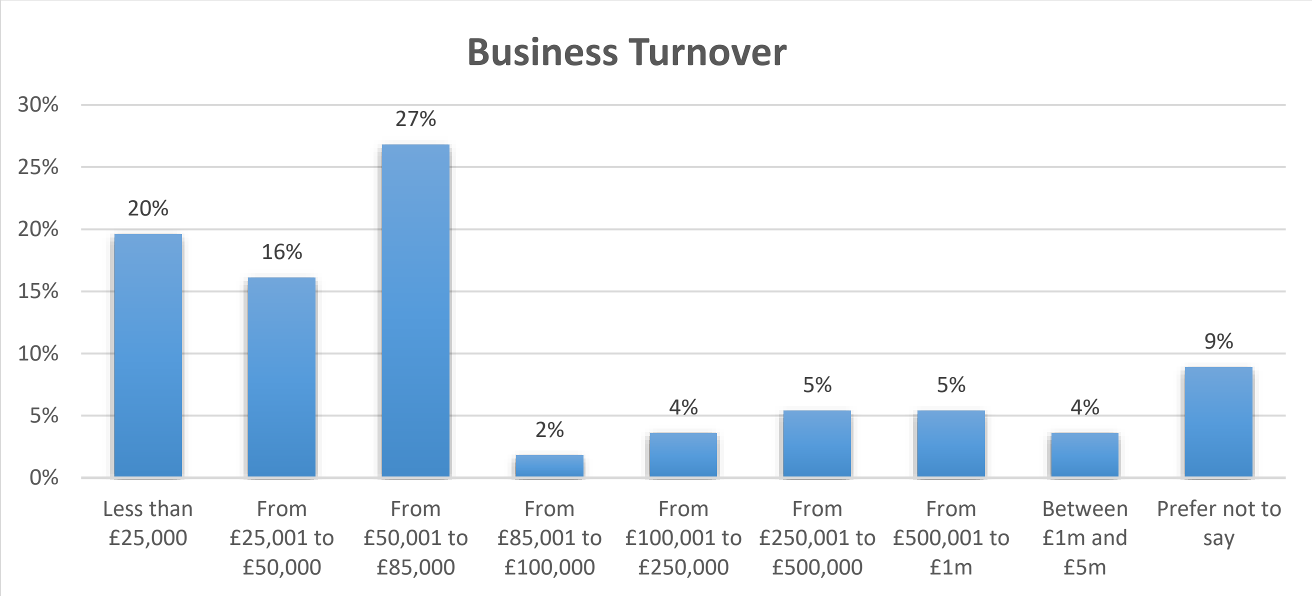



*Figure 3. Business Type. N=52*

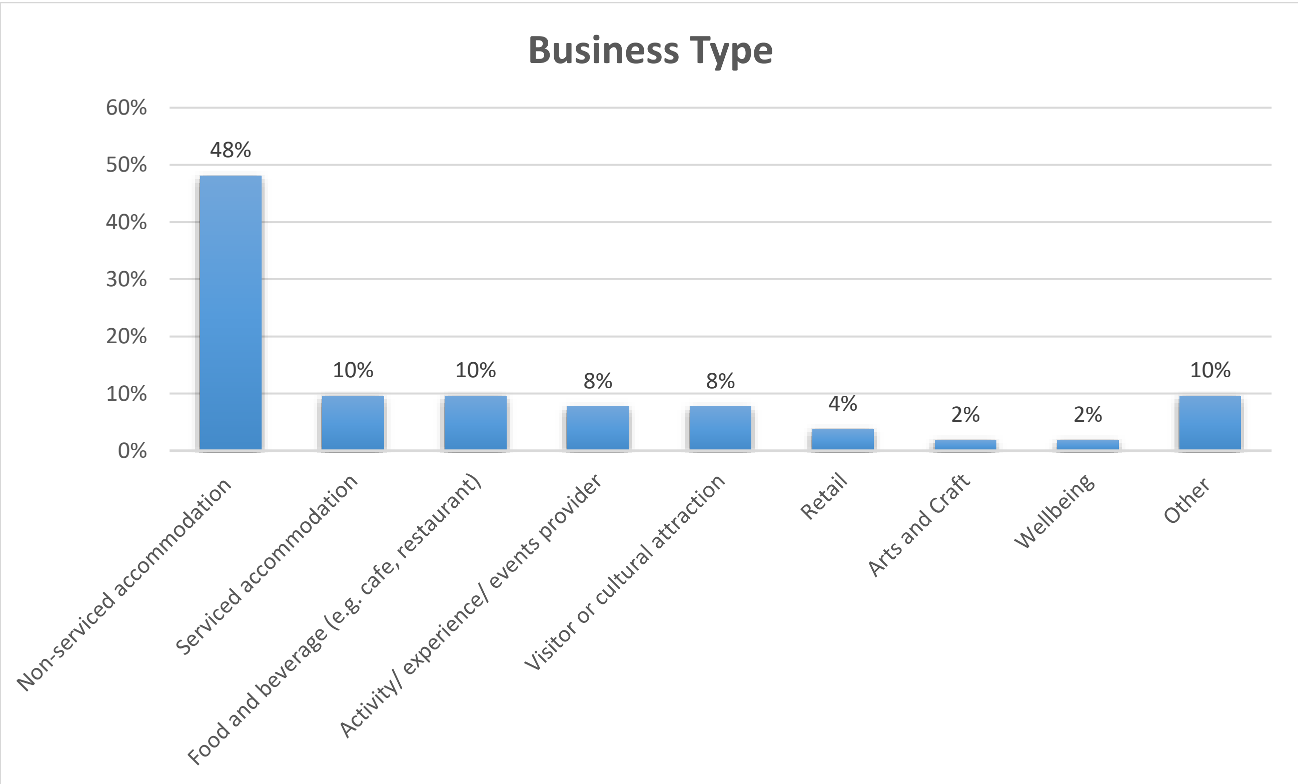
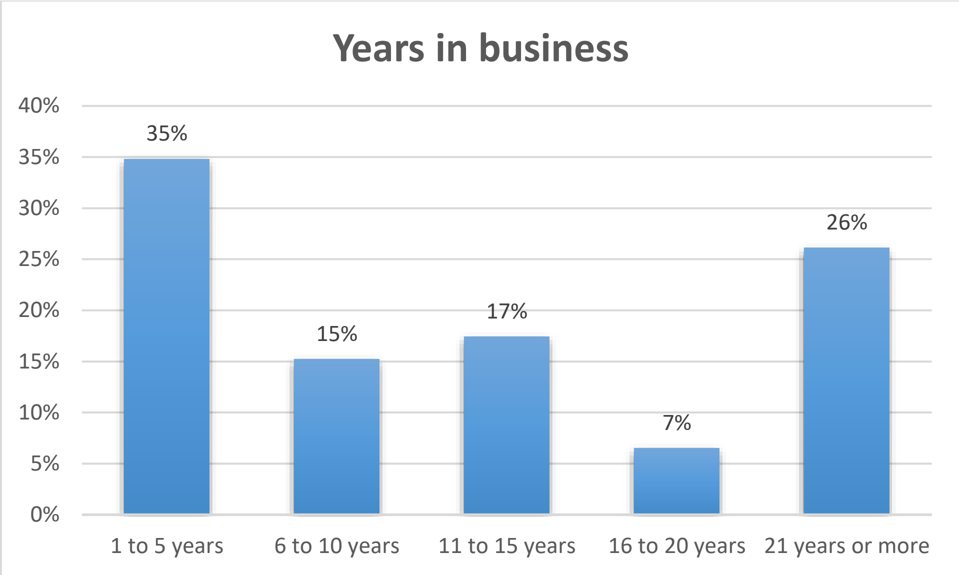


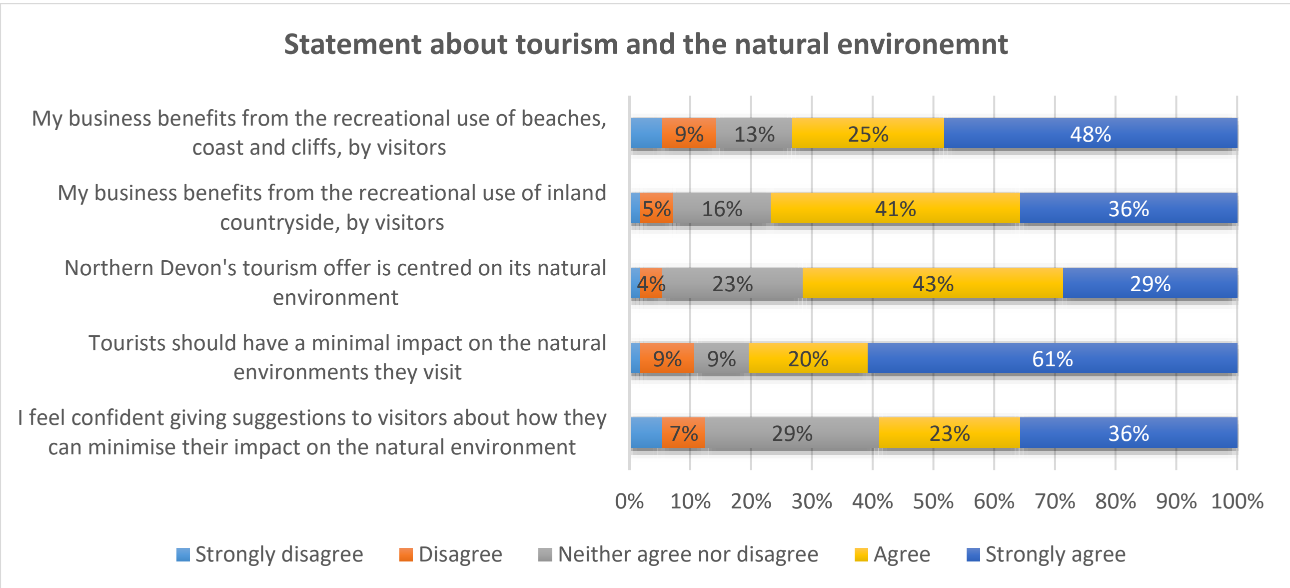
*Figure 4. Years in Business. N=46*




### 3.2. Views on the natural environment and tourism

We were interested in businesses' views on whether the natural environment benefitted their businesses. The results (see Figure 5) indicate that businesses recognise the benefits that the natural environment, both coastal and inland, bring to their business. Almost half (48%) of business strongly agreed that their business benefits from the use of beaches, coast and cliffs by visitors. More broadly, businesses saw Northern Devon's tourism offer as centred on its natural environment, with 72% either agreeing or strongly agreeing with the statement about that (see Figure 5). There was also broad agreement with the statement that visitors should have a minimal impact on the natural environments they visit (81% agreed or strongly agreed), suggesting businesses support responsible tourist behaviour. There was some disagreement and ambivalence when it came to businesses feeling confident that they could give suggestions to visitors about minimising their impact on the environment.

*Figure 5. How much do you agree or disagree with these statements about tourism and the natural environment in Torridge and North Devon districts (i.e. Northern Devon)? N=56*



### 3.3. How do tourism business express the benefits of the natural environment

There was a free text space for respondents to explain how the natural environment in Northern Devon benefits their business. Answers fell into four categories.

1. Business described benefits in terms of visitors being attracted to qualities of the natural environment; e.g. beauty, peace. For instance:

    *"The unique and spectacular coastal areas attract a lot of visitors as well as the more familiar beaches and commercial tourist attractions. The fact that the area is currently less busy than, say, south Devon is also an attraction*."

    *"Tourists like to visit peaceful places in the countryside, and learn a bit about agriculture."*

2. Businesses described benefiting because visitors attracted to types of natural environment; beach, rural Devon:

    *"People visit here to visit / experience coastline and countryside"*

    *"Guests come to enjoy the coast"*

3. Businesses described benefiting because visitors attracted to outdoor activities on offer:

    *"Yes, we are [a business with green/sustainable values] and attract lots of like-minded guests who enjoy walking, cycling and wild swimming"*

    *"People cycling and walking come to our cafe and use our accommodation"*

    *"Customers wanting to surf/body board, walk, cycle"*

4. Businesses described benefiting because visitors attracted cycling or walking infrastructure e.g. Tarka Trail, SW Coast Path:

    *"Tarka Trail - cyclists & walkers"*

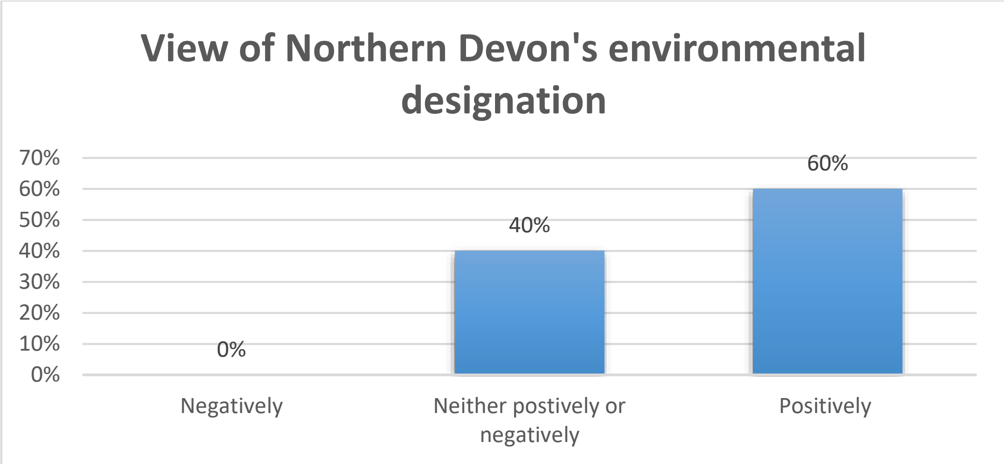
    *"Use of Tarka Trail, Beaches, etc."*

### 3.4. Perception of environmental designation

We asked business whether they viewed environmental designation of the region positively or negatively. We did this using a scale of 1-9 where 1 was very negative and 9 was very positive. Most respondents saw environmental designation as positively scoring it 7,8,9, but 40% were ambivalent scoring it 4,5,6. No respondents saw designation as negative, however we should bear in mind the overall response rate, and 'nature tourism' theme of the survey. Those with more negative views may not have completed the survey.

Given that businesses largely saw visitor use of the natural environment as benefitting their business it seems likely that this translates to positive views of environmental designation. Since 40% were ambivalent though, this could suggest that more could be done to communicate to tourism businesses the role that environmental designation plays in managing and maintaining the natural spaces the visitor use.

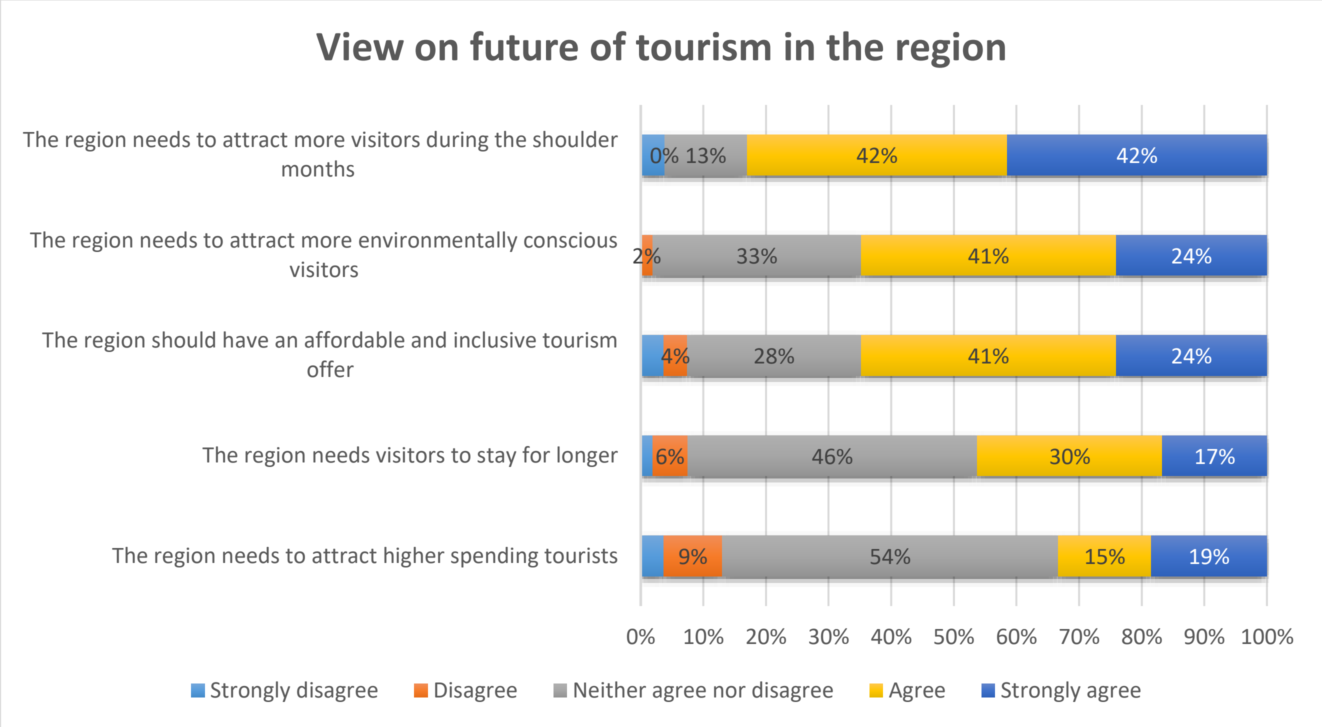
*Figure 6. View of Northern Devon's environmental designation. Question wording: Much of the northern Devon region has an environmental designation (such as, Area of Outstanding Natural Beauty, UNESCO Biosphere Reserve, National Park). On a scale of 1 to 9, how positively or negatively do you view environmental designation for your business? N=45*




## 3.5. Views on tourism recovery in the region

We explored views on the future of tourism in the region and what would aid tourism recovery from Covid. Most businesses (83%) agreed that the region needs to attract more visitors during the shoulder months. Almost two thirds (65%) agreed or strongly agreed that the region needs to attract more environmentally conscious visitors. There was the same level of support (65% agreed/strongly agreed) for the idea that the region should have an affordable and inclusive tourism offer. There was more ambivalence with the statement that 'The region needs visitors to stay for longer' and that 'The region needs to attract higher spending tourists', with around half of respondents saying they neither agreed nor disagreed with these statements (see Figure 7).

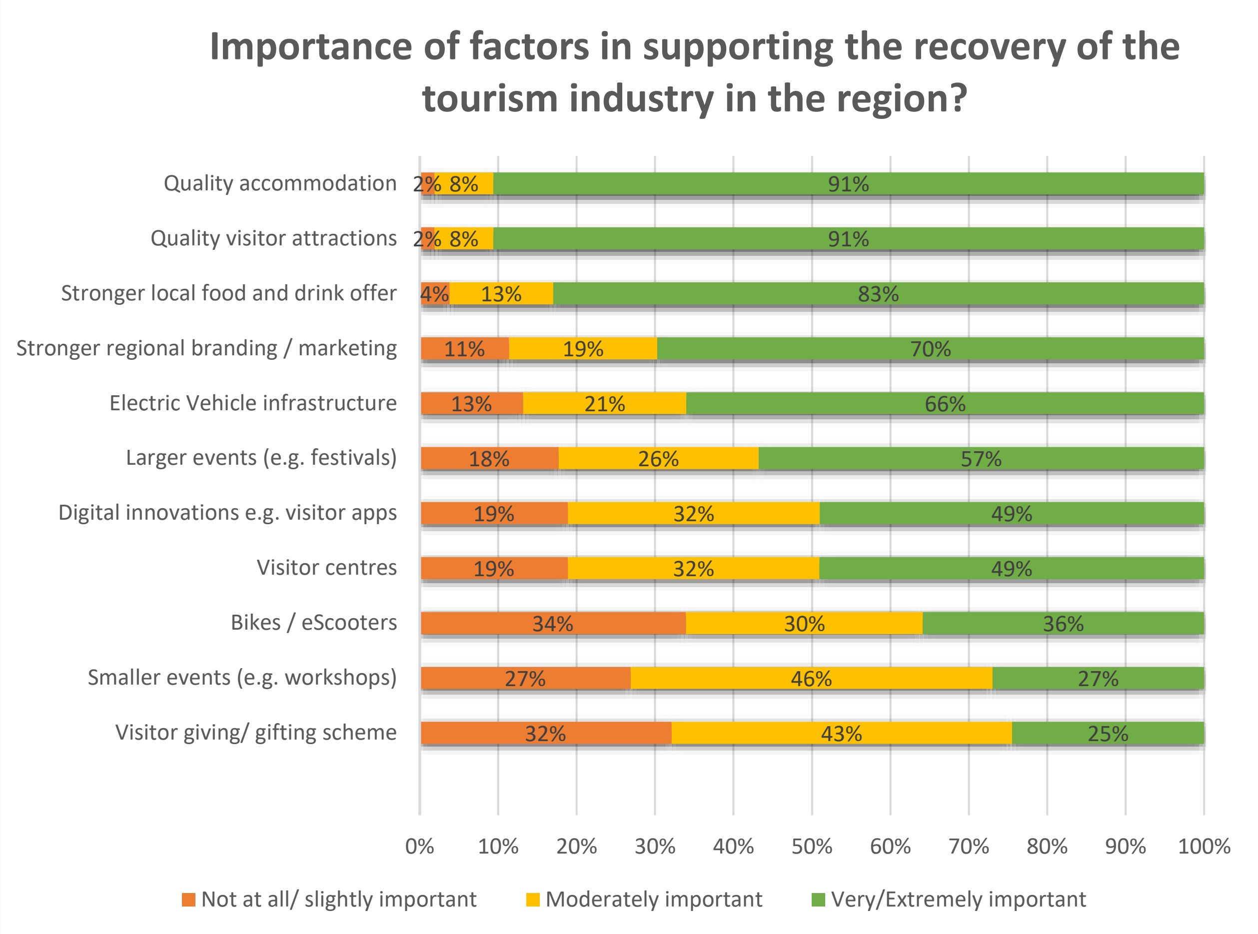
*Figure 7. View on the future of tourism in the region. N=54*




Businesses were asked to rank the importance of a range of factors in the recovery of tourism in the region (see Figure 8).[1] Nearly all (91%) respondents saw Quality Accommodation and Quality Visitor Attractions as very important in supporting the recovery of the tourism industry in the region. A stronger local and food and drink offer was also seen as very or extremely important by a large proportion of respondents (83%). Around two thirds of respondents saw stronger regional branding (70%) and electric vehicle infrastructure (66%) as very important. About a third of respondents saw bikes/e-scooters (34%), smaller events (27%) and visitor gifting schemes (32%) as not very important in the regions recovery.

[1] Please note the results present here have been aggregated. The scale used in the survey was 1-5. These have been aggregated into 3 groups to aid interpretation.

*Figure 8. Importance of factors in supporting the recovery of the tourism industry in the region. N=53*




## 3.6. Preferences for the future of tourism and future of businesses

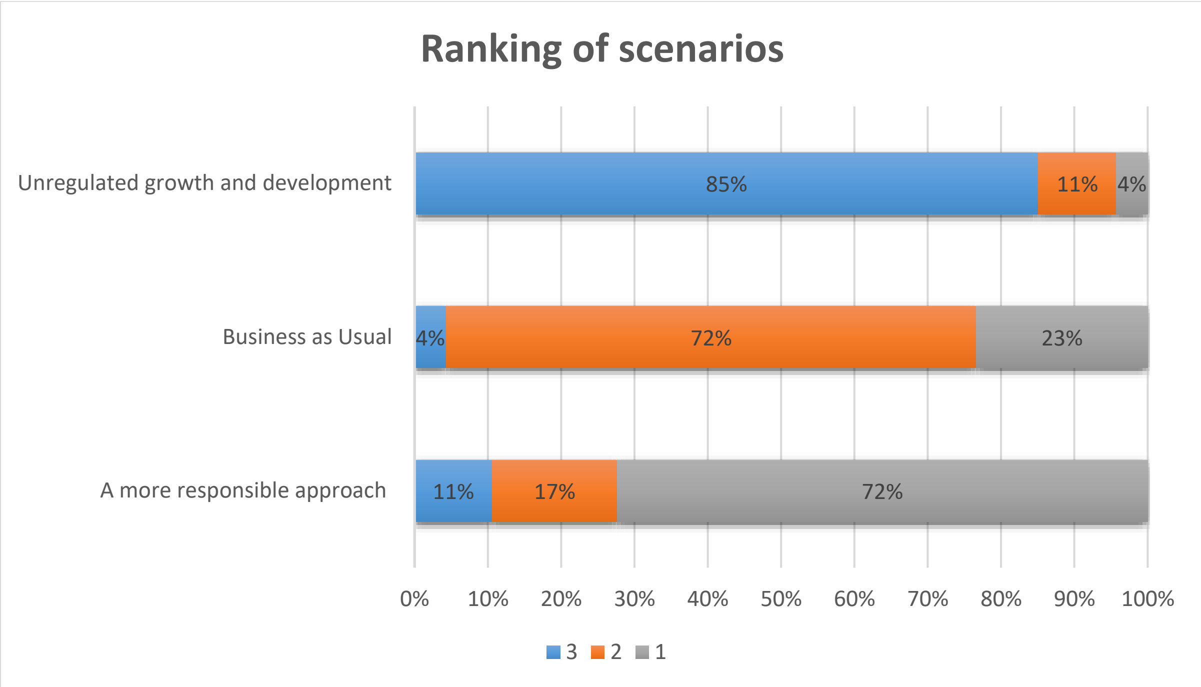
The survey linked with work around future scenarios for tourism undertaken by the BioCultural Heritage Tourism project, and included a question asking respondents to rank descriptions of future scenarios for tourism in order of preference. The descriptions of each scenario are given below (see Figure 9).

*Figure 9. Scenario descriptions*

| ***Scenario descriptions*** |
|---|
| **Business as usual** – much the same as in the past; seasonal tourism concentrated in the summer and at particular, popular sites |
| **Unregulated growth and development** – removing restrictions to development; allowing more businesses to benefit from more sites opened up, with broadly the same season |
| **A more responsible approach** – managed change; reducing the pressures in peak periods and at key environmental sites; spreading the benefits of tourism more widely throughout the year, across area, and to local communities |

Most respondents ranked *A more responsible approach* as their first preference (72%) and *Unregulated growth and development* as their third preference (85%). Business as usual was the first preference for 23% of respondents. This suggests support for *A more responsible approach* to tourism in the region and little appetite for *Unregulated growth and development*. The small sample size obtained by the survey should be noted though, before extrapolating from these results to all tourism businesses in Northern Devon. Businesses less engaged with nature tourism may not have completed the survey.

*Figure 10. Ranking of scenarios in preference order (1= most favoured, 3 = least favoured). N=47*




### 3.7. Awareness of the new Northam Burrows Visitor Centre and view of Nature Tourism Officer's role

Just over two thirds (63%) were aware of the new Northam Burrows Visitor Centre, and approximately a third (31%) were not (see Figure 10). Respondents were asked how they saw the Nature Tourism Officer role attached to the development of the new Visitor Centre (see Figure 11). Over half (58%) saw 'Developing the regions tourism offer e.g. events' as very or extremely important, and about half (53%) saw 'communicating opportunities for nature tourism to visitors' as very or extremely important. Less than half saw 'creating networking opportunities for tourism businesses' (46%) and 'Helping local businesses develop opportunities for nature tourism' (42%) as very or extremely important. There appears to be broad support for each of these features, however it should be noted that approximately one third of participants scored these factors as 3 out of 5, indicating their moderate importance, and that approximately a fifth saw the creation of 'networking opportunities' (20%) and 'helping business develop opportunities for nature tourism' (22%) as not at all or only slightly important (see Figure 12).

*Figure 11. Awareness of the new Northam Burrows Visitor Centre. N=51*

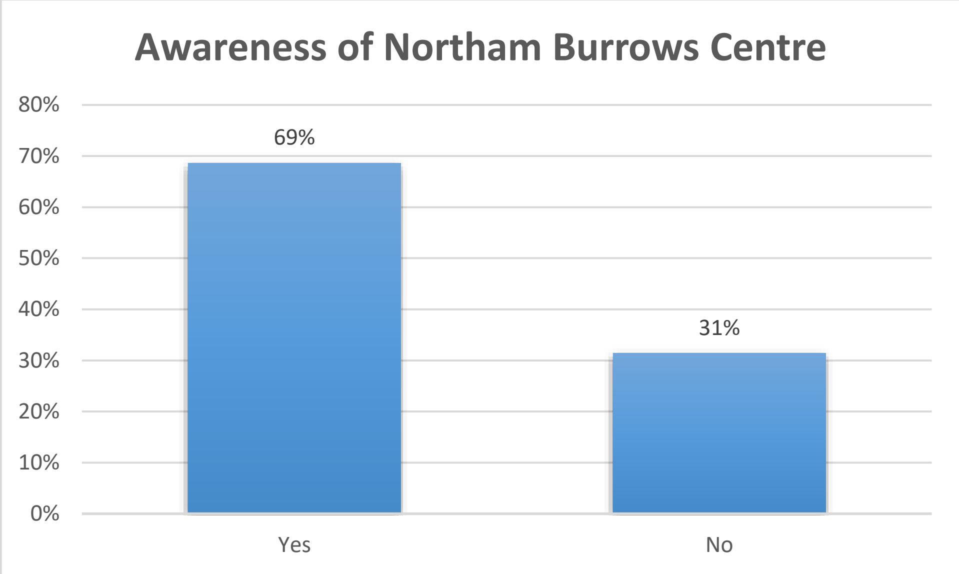



*Figure 12. Nature Tourism Officer Role. N=55*


## 3.8. Methods of promotion and marketing

Respondents reported a range of methods were used to promote and market businesses (see Figure 13); with most respondents using their own digital marketing (91%), social media (84%) and personal recommendations (80%). Fewer businesses were using written materials (34%) or destination marketing websites (29%) but approximately one third said they did. We asked businesses which methods of promotion were most successful (see Figure 14). About half of businesses said it was their own digital marketing (55%) or personal recommendation (48%). Social media (39%) and online booking services (38%) were most successful for around two fifths of respondents. Written material, destination marketing websites and business charter/ certification were seen as most successful by a much smaller proportion of respondents, however these were used by fewer respondents too.

*Figure 13. Methods of promotion used*

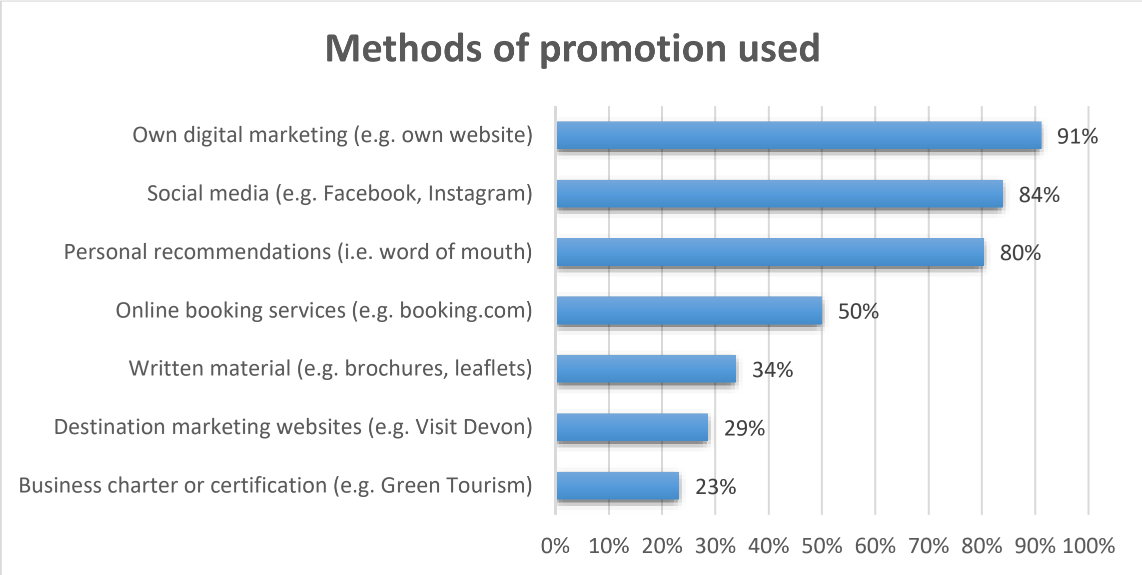
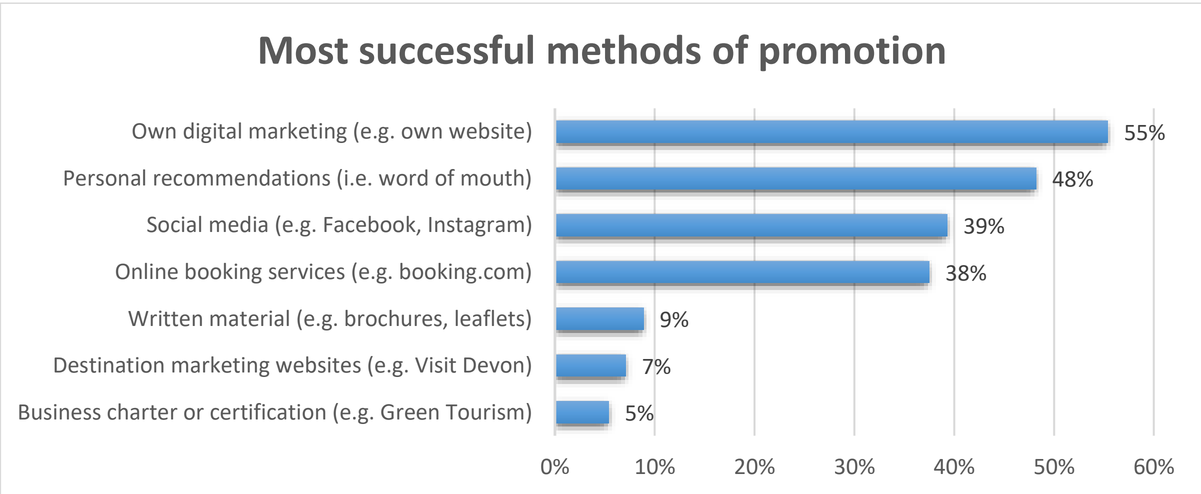



*Figure 14. Most successful methods of promotion*




## 4. Conclusions

### 4.1. Recommendations

The results from the survey come with the caveat that this is a small sample size and so cannot be taken as representative of all tourism businesses in Northern Devon. Nevertheless, the results do provide some insights into tourism businesses and their views, which can be used to inform management of tourism in Northern Devon. Based on the results of the survey, the recommendations below are made:

1. Better communicate the value of environmental designation for the region and for tourism. Two fifths of businesses didn't view the designation of the region's natural environment as

positive for their businesses; while not viewing it negatively, 40% were ambivalent. Given that nearly all tourism businesses saw visitors' use of the region's natural environment as benefiting their business, the view of environmental designation is notable. There is potential for making more of the value of environmental designation to visitor enjoyment of the region, and to businesses. Providing tangible examples of improvements to natural sites might be useful.

2. Explore what actions businesses are willing to take to move towards a more responsible approach to tourism in the region. There was a preference for a more positive future for tourism in the region, but there is more work to do to identify the roles that various stakeholders (tourism businesses, visitors, planning authorities, NGOs) play in implementing change as tourism recovers from Covid. This could be achieved in a focus group or stakeholder workshop.
3. Provide businesses with materials that help them educate visitors how to minimise their impact on Northern Devon's environment. These should be practical suggestions (e.g. buy local food or a veg-box rather than shop in the supermarket).
4. It was striking that a stronger local food and drink offer was scored as one of the most important factors in the region's recovery from Covid. This was scored higher than stronger regional branding/ marketing. There appears to be a broad recognition of the opportunity here and could be a useful theme for development of the region's nature tourism offer.
5. Only a small proportion of the sample was using business charter/ certification as a way to promote or market their business, and very few respondents saw this the most successful form of marketing. It would be useful to understand more about why this is and what it would take for an eco-charter to be more successful as a form of business promotion.

### 4.2. Lessons learnt

The project was negatively impacted by Covid. There are some broad lessons learnt, which could be applied to future survey-based tourism research in Northern Devon:

1. Raising the response rate would be a clear priority for any follow up. If possible avoiding peak season as a time for circulating the survey.
2. The high proportion of accommodation providers in the sample partly reflects the number of these businesses in the sector, but may also reflect which businesses see themselves as a 'tourism businesses'. The link between accommodation and tourists is clear, whereas for food and retail businesses customers will be a mix of tourists and residents, and the businesses may not see themselves as 'tourism businesses'. Although some food businesses and retail businesses completed the survey this time, future work could explore circulating surveys to target groups using different survey names, but the same questions. For instance, for some businesses seeing a 'Northern Devon tourism business survey' may immediately lead potential respondents to disengage if that business does not identify themselves as a 'tourism business'. Perhaps 'Northern Devon *food* business survey: tourism' or 'Tourism survey for Food Businesses', might flag to potential participant that the survey is for them.
3. Linked to the above, it would be worth consulting non-accommodation tourism businesses where they would receive a survey from.
4. Consider resource allocated to distribution of paper surveys; we had responses from 23 of 100. To achieve at least 100 responses could require circulating over 400 letters, and reminders. There is a cost and administration cost there, both in terms of packing the envelopes and data entry.
5. Engaging with key businesses and requesting they circulate the survey to their contacts may raise the response rate.

6. What sorts of incentives might encourage business to complete the survey? There is a need to consult on what would motivate completion.
7. We involved tourism businesses in the piloting of the survey. If it was not for Covid-related delays to the launch of the survey, there may have been an opportunity to re-engage with those who inputted into the survey as part of the analysis of the results. Time pressure meant this was not possible this time, but in future it would be useful to discuss results with key stakeholders.
8. Suggestions for repeat question in a future baseline survey. Consider repeating question numbers: 3, 5, 8, 9, 11, 15, 16, 17, 22, 24 (see Appendix 1).

## Appendix 1

Copy of survey instrument

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**Please read these two statement and tick to confirm** (*if you return the survey without ticking these we can't use your response*)

**1**. I confirm that I have read the information sheet, understand that data collected will be looked at by researchers at University of Exeter, that anonymised, aggregated results will be shared with Torridge District Council and tourism business organisations, and that data may be used in academic publications or conferences. ☐

**2**. I understand that while completing the survey I can stop at any time and withdraw, however once I return the postal survey I may not be able to withdraw my data as responses are anonymous. ☐

**THE NATURAL ENVIRONMENT AND TOURISM**

**3.** How much do you agree or disagree with these statements about tourism and the natural environment in Torridge and North Devon (i.e. Northern Devon)?

**1 = Strongly disagree >> 3 = Neither agree nor disagree >> 5 = Strongly agree**

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Northern Devon's tourism offer is centred on its natural environment | | | | | |
| My business benefits from the recreational use of beaches, coast and cliffs, by visitors | | | | | |
| My business benefits from the recreational use of inland countryside, by visitors | | | | | |
| Tourists should have a minimal impact on the natural environments they visit | | | | | |
| I feel confident giving suggestions to visitors about how they can minimise their impact on the natural environment | | | | | |

**4.** If you feel your business benefits from Northern Devon's natural environment, please tell us how:

**5.** Much of the northern Devon region has an environmental designation (such as, Area of Outstanding Natural Beauty, UNESCO Biosphere Reserve, National Park). On a scale of 1 to 9, how positively or negatively do you view environmental designation for your business?

**1 = Very negatively >> 5 = neither positive or negative >> 9 = very positively**

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |

**NORTHAM BURROWS VISITOR CENTRE**

**6.** Are you aware of the new visitor centre at Northam Burrows?

☐ Yes ☐ No

**7.** The Burrows visitor centre has a new Nature Tourism Officer. How important are these parts of their role to you?

**1 = Not at all >> 3 = Moderately important >> 5 = Extremely important**

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Helping local businesses develop opportunities for nature tourism and to incorporate nature tourism into their offer | | | | | |
| Communicating opportunities for nature tourism to visitors (e.g. via websites, social media) | | | | | |
| Creating networking opportunities for tourism businesses | | | | | |
| Developing the region's tourism offer e.g. events | | | | | |

**TOURISM RECOVERY**

**8.** How much do you agree or disagree with these statements about tourism in the region?

**1 = Strongly Disagree >> 3 = Neither agree nor disagree >> 5 = Strongly Agree**

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| The region needs to attract higher spending tourists | | | | | |
| The region should have an affordable and inclusive tourism offer | | | | | |
| The region needs to attract more environmentally conscious visitors | | | | | |
| The region needs to attract more visitors during the shoulder months | | | | | |
| The region needs visitors to stay for longer | | | | | |

**9.** In your view how important will these factors be in supporting the recovery of tourism industry in the region?

**1 = Not at all >> 3 = Moderately important >> 5 = Extremely important**

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Stronger regional branding / marketing | | | | | |
| Smaller events (e.g. workshops) | | | | | |
| Larger events (e.g. festivals) | | | | | |
| Quality accommodation | | | | | |
| Quality visitor attractions | | | | | |
| Stronger local food and drink offer | | | | | |
| Visitor centres | | | | | |
| Visitor giving/ gifting scheme | | | | | |
| Electric Vehicle infrastructure | | | | | |
| Bikes / eScooters | | | | | |
| Digital innovations e.g. visitor apps | | | | | |

**10.** In your view, how important are these factors in attracting visitors to the region?

**1 = Not at all >> 3 = Moderately important >> 5 = Extremely important**

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| The natural environment | | | | | |
| Local history and heritage | | | | | |
| Outdoor activities on offer | | | | | |
| Walking/ cycling routes | | | | | |

**11.** We're giving some thought to what tourism might be like in the future, in the region. Please rank these according to your preference.

**1= most favoured >> 3 = least favoured**

| | *Rank* |
|---|---|
| Business as usual – much the same as in the past; seasonal tourism concentrated in the summer and at particular, popular sites | |
| Unregulated growth and development – removing restrictions to development; allowing more businesses to benefit from more sites opened up, with broadly the same season | |
| A more responsible approach – managed change; reducing the pressures in peak periods and at key environmental sites; spreading the benefits of tourism more widely throughout the year, across area, and to local communities | |

2

**12.** Are there any factors that are having a negative impact on visitors' experience of the region at the moment?

**LOCAL FOOD**

**13.** Do you buy food produced (e.g. meat, seafood, vegetables) in North Devon or Torridge districts directly from producers (e.g. farmers, growers, fishers)?

☐ Yes ☐ No ☐ Don't know

**14.** If you buy food produced in North Devon or Torridge districts, what motivates you to use locally produced food?

**YOUR BUSINESS**

**15.** What is your MAIN area of business?

*Please tick ONE only*

☐ Serviced accommodation provider (e.g. hotel, B&B)
☐ Non-serviced accommodation provider (e.g. self-catering, hostel, AirBnB)
☐ Food and beverage (e.g. cafe, restaurant)
☐ Activity/ experience/ events provider
☐ Tour operator
☐ Retail
☐ Cultural attraction (e.g. museum, art gallery)
☐ Passenger transport (including luggage transfer)
☐ Arts and Craft
☐ Wellbeing
☐ Other (please tell us) ______________

**16.** Please describe in your own words what your business offer is.

*For example, 'accommodation and outdoor activities'; 'café and bookable rooms for events'*

**17.** How many years have you been in business?

______________ years

**18.** Which of these methods of promotion do you use? Overall, which are particularly successful?

*Please tick as many as apply in BOTH COLUMNS*

| | I use it | Particularly successful |
|---|---|---|
| Own digital marketing (e.g. own website) | | |
| Social media (e.g. Facebook, Instagram) | | |
| Written material (e.g. brochures, leaflets) | | |
| Personal recommendations (i.e. word of mouth) | | |
| Destination marketing websites (e.g. Visit Devon) | | |
| Online booking services (e.g. booking.com) | | |
| Business charter or certification (e.g. Green Tourism) | | |

**19.** Are there other approaches you use?

**20.** Do you do any of the following to promote the region to your customers?

*Please tick as many as apply in BOTH COLUMNS*

| | Before they arrive | On or after arrival |
|---|---|---|
| Recommend places to visit: beach, coast, cliffs | | |
| Recommend places to visit: inland countryside | | |
| Recommend places to visit: towns and villages | | |
| Recommend activities to do | | |
| Signpost local businesses on your website | | |
| Have flyers for attractions and activities available | | |
| Mention North Devon Food Trail app | | |
| Mention iNaturalist app | | |
| Other (please tell us) ____________ | | |

**21.** Please let us know whether your business is part of the two schemes below.

| | Yes | No | Don't know |
|---|---|---|---|
| My business is a member of North Devon Biosphere Reserve Business Partnership | | | |
| My business has Surfers Against Sewage (SAS) Plastic Free Status | | | |

**22.** How many staff does the business employ? *Please INCLUDE yourself in the figures and INCLUDE staff on furlough.*

☐ 0 to 9 employees
☐ 10 to 49 employees
☐ 50 to 249 employees
☐ 250+ employees

**23.** How many seasonal, temporary or casual staff did you employee in these two time periods? *Please enter numbers in the table.*

| | **Oct 2020 to May 2021** | **June 2021 to Aug 2021** |
|---|---|---|
| Temporary, casual or seasonal workers | | |

**24.** Approximately, what was your business' turnover in the last financial year (April 6th 2020 to April 5th 2021)? *Answers to this survey are anonymous and cannot be traced to your business.*

☐ Less than £25,000
☐ From £25,001 to £50,000
☐ From £50,001 to £85,000
☐ From £85,001 to £100,000
☐ From £100,001 to £250,000
☐ From £250,001 to £500,000
☐ From £500,001 to £1m
☐ Between £1m and £5m
☐ Over £5m
☐ Prefer not to say

**25.** What percentage (%) of your turnover in the last financial year (April 6th 2020 to April 5th 2021), do you estimate is due to spend by tourists or visitors, rather than local residents?

____________%

**PTO FOR THE FINAL PAGE OF THE SURVEY**

**27.** How much do you agree with these statements about your business?

**1 = Strongly Disagree >> 3 = Neither agree nor disagree >> 5 = Strongly Agree**

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| I was content with the level of business I had pre-Covid | | | | | |
| I am content with the level of business I have now | | | | | |
| I want the business to grow from its current levels | | | | | |
| I would like additional customers during the shoulder season (April to mid-June) | | | | | |
| I would like additional customers during the shoulder season (mid-September to October) | | | | | |
| I would like additional customers during low season (November to March) | | | | | |

**28.** How much do you agree with the statements below? Over the next *three years* I expect the business to…

**1 = Strongly Disagree >> 3 = Neither agree nor disagree >> 5 = Strongly Agree**

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Employ more staff | | | | | |
| Expand operations/ diversify | | | | | |
| Become more profitable | | | | | |
| Be sold | | | | | |
| The owner to retire | | | | | |
| Close down | | | | | |
| Return to pre-COVID profit levels | | | | | |

**29.** Are there specific opportunities which you see for your business in the post-Covid era?

**LOCATION**

**30.** Excluding the last 2 digits, please enter your postcode below. We would like to know the first part of the postcode and the first number of the second part. For instance, if your postcode was 'EX14 7BZ', please enter 'EX14 7'. *This information will not be used to individually identify your business.*

**END OF SURVEY**

**Thank you for taking the time to complete the survey.**

Please return the survey using the stamp addressed envelope. Please review our research ethics (Q1 and Q2) before to returning the survey.

If you would like to enter the **prize draw** for a hamper of local food worth £100 (no cash alternative), please include an email address here:

*N.B. These contact details with only be used for the purposes of the prize draw. They will be stored until the winner is announced and then deleted*

*If you would like to make any other comments about tourism in Northern Devon or the survey, please use this space*

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