Exmoor Visitor Economy Covid-19 2020 Impact Survey- **Summary Report**

1. Background

Each year Exmoor National Park Authority commissions GTS (UK) Ltd to estimate the annual volume and value of tourism in the area using the STEAM model. Pre Covid, in 2019, Exmoor welcomed an estimated 2.3m visitor days, worth almost £134m to the National Park economy (2019 STEAM report, GTS UK Ltd) rising to an estimated £431m for the Greater Exmoor area. Tourism accounted for approx. two thirds of Exmoor National Park's GVA and over 50% of employment (Rural Enterprise Exmoor Research Report 2020).

The impact of Covid-19 will have been significant in 2020 and has also caused delays and gaps in tourism data provision for 2020 to feed into the STEAM model.

This summary highlights key findings of an additional online survey conducted by GTS (UK) Ltd to assess the impact of the pandemic on capacity and performance of the visitor economy. The full report is available at https://www.exmoor-nationalpark.gov.uk/living-and-working/info-for-tourism-providers/tourism-research. In due course this will feed into the STEAM volume and value modelling which will provide some qualitative figures on the likely impact of Covid-19 on the overall visitor economy in 2020.

Exmoor National Park and Greater Exmoor:

The survey encouraged responses from businesses within the National Park and those within a 10 mile radius (referred to as Greater Exmoor). A total of 115 responses were received - two thirds of which were within the National Park. For this summary the *total* results from *all* businesses are presented. The full GTS report provides, where relevant, a split between those located in the National Park and those outside to highlight any key differences.

2. Key findings:

- On average, through the year, businesses that were open were operating at 53% of their 2019 capacity.
- On average, businesses received 49% of their 2019 visitor figure in 2020.
- In total, tourism businesses in the area received an average 50% of their 2019 visitor income in 2020.
- Redundancy levels have been relatively low at 3-4% per quarter. However, the levels of those furloughed have been high, peaking at 51% in April to June and dropping to a low of 19% in Jul -Sept. These furlough figures may mask a future issue with redundancies.
- Nearly half of businesses (49%) thought they would reach their previous levels of business immediately or within three months of COVID restrictions being lifted. A fifth however thought it would take longer than a year.

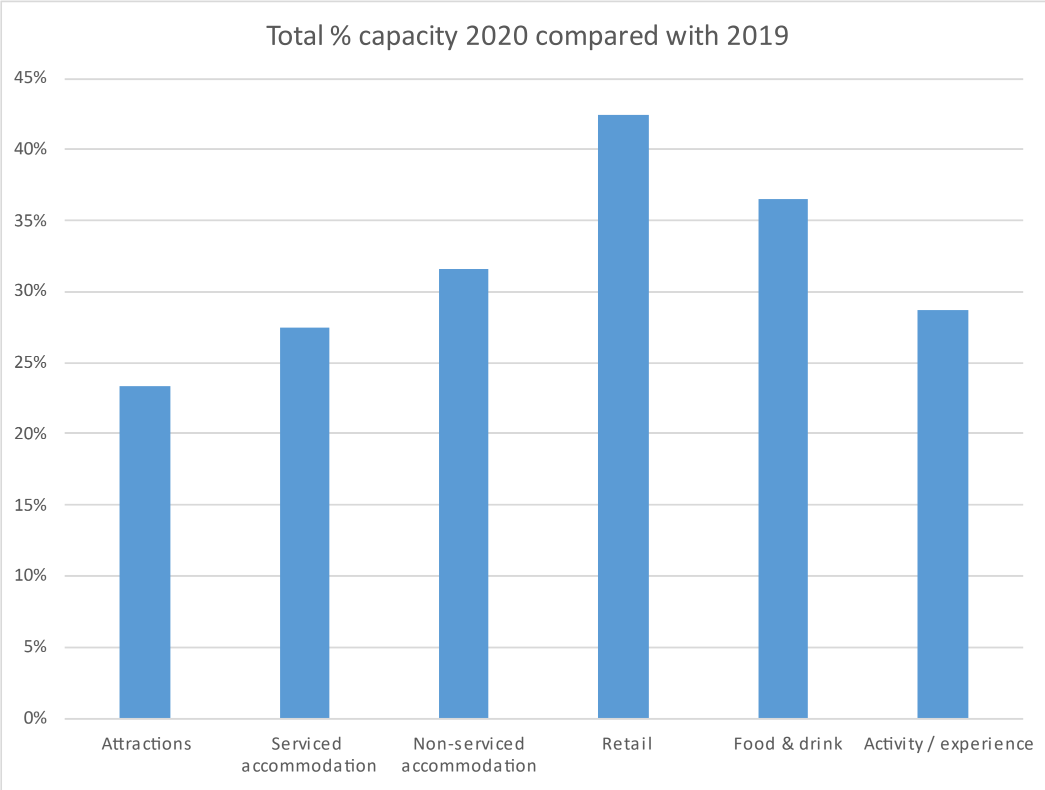
3. Businesses open and their capacity

Overall, the percentage of businesses open across the visitor economy (including attractions, activity/experience providers, accommodation, retail and food/drink outlets) fell to a low of just 18% in April recovering to a high of 88% in September before falling again to 27% in November (the second national lockdown) and 55% in December (tier restrictions).

For those open, capacity fell to an average of 38% of 2019 levels in April, rising to a high of 73% in August before tailing off again. **On average, through the year, businesses that were open were operating at 53% of their 2019 capacity.**

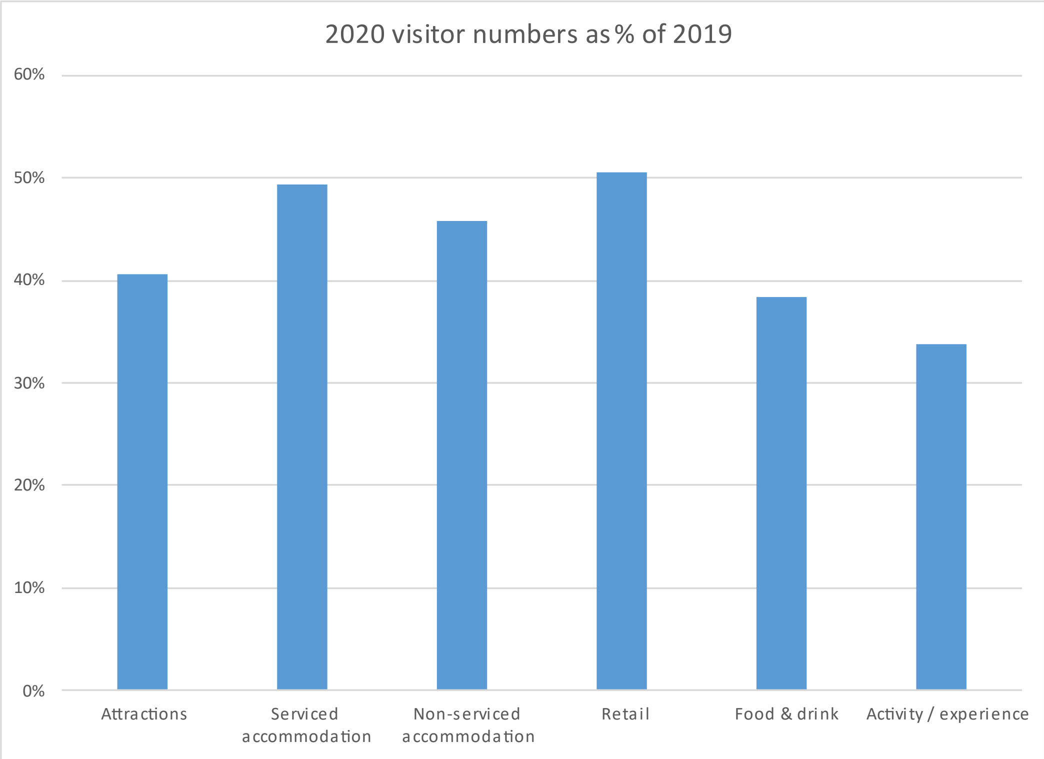
4. Overall capacity within visitor economy sub sectors

By combining the percentage of businesses open and the capacity of the open businesses we can calculate the overall capacity of each sector for 2020 compared with 2019.



Attractions were hardest hit, with the combination of business closures and reduced capacity for open businesses meaning that in 2020 the sector only achieved 23% of its 2019 capacity. Even the retail sector, which had a larger proportion of businesses open and a higher capacity for those businesses, only achieved 42% of 2019 capacity.

5. Visitor Numbers



On average businesses had a slow start to the year with visitor numbers only at 77% of 2019 levels in January. In April and May, visitor numbers were at just 1% of 2019 levels, rising swiftly from 8% in June to 78% in July, then up to 90% in October before dropping back down to 6% in November. On average, businesses received 49% of their 2019 visitor figure in 2020.

There were greater differences between business types, with the retail sector seeing 51% of its 2019 visitor number while activity and experience providers only saw 34%.

There was considerable variation in the individual responses from businesses – for example in August some were showing good increases on 2019 but others performed less well or remained closed, with the overall effect that the average level remained down.

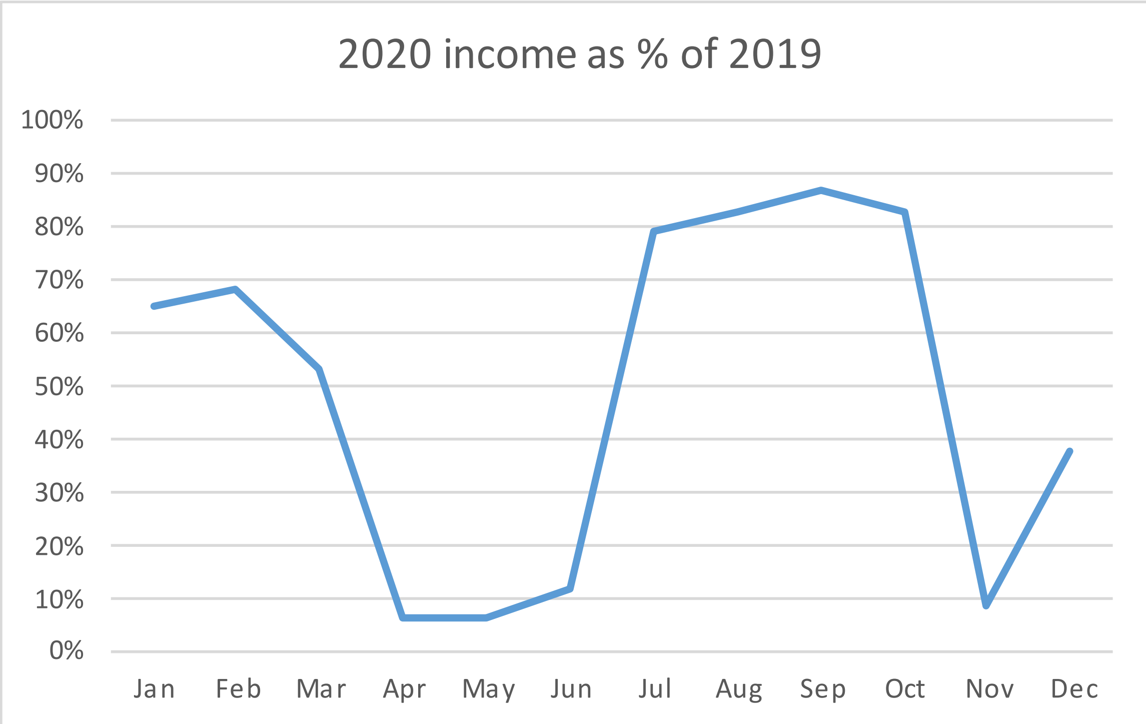
Anecdotal evidence on the ground suggests that following the first lockdown overall visitor numbers within the National Park were significantly higher than previous years - the ENPA Ranger team guesstimate this to be in the region of 30% increase based on things like car parking and footfall at key areas.

This apparent contradiction suggests that a number of visitors were utilising the National Park for recreation but were not necessarily utilising local businesses.

6. Visitor Income (excluding government grants and external support)

In total, tourism businesses in the area received an average 50% of their 2019 visitor income in 2020.

Analysis by business type shows a generally close relationship between visitor number and visitor income, although there is more variation in income. Activity and experience providers fared worst on both counts, only receiving 28% of their 2019 income from 34% of their 2019 visitor number. The striking outlier is the retail sector, where 88% of the 2019 income was achieved from only 51% of the 2019 visitor number.



Business type	Visitor number as % of 2019	Visitor income as % of 2019
Attraction	41%	33%
Serviced accommodation	49%	45%
Non-serviced accommodation	46%	48%
Retail	51%	88%
Food & drink	38%	45%
Activity/Experience provider	34%	28%

7. Employment

For each quarter of 2020, businesses were asked how many employees they had in 2019, then how many in 2020 were working, furloughed, or made redundant. In the following analysis the number of staff working, furloughed, or made redundant are expressed as a percentage of the 2019 employment figures.

Overall trends by quarter 2020 staffing as % of 2019 total

	% in work	% furloughed	% made redundant
January-March	85%	32%	4%
April-June	57%	51%	3%
July-September	80%	19%	4%
October-December	69%	36%	4%

Note: The quarterly totals may sum to more than 100% as staff members may be furloughed for part of the quarter and in work for the remainder, so are counted in both categories

The most positive element to be taken from these figures is the low level of redundancy, probably due to the use of the furlough scheme. This may also reflect some casual or seasonal contracts may not have been filled in 2020.

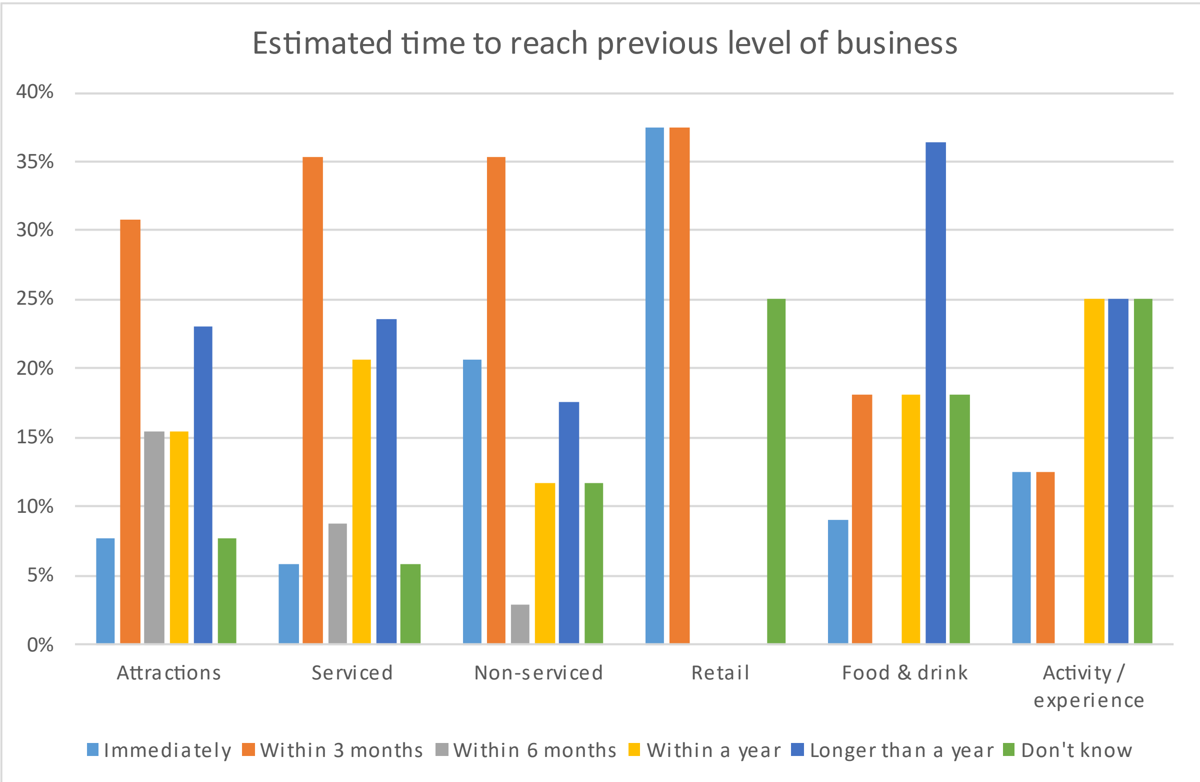
There were significant differences between business types, with food & drink outlets keeping an average of 84% of their 2019 staff level in work while the figure for activity/experience providers was only 58%. Redundancy levels followed the same patterns, with 9% of staff in the activity and experience sector made redundant, while less than 0.5% in the food & drink sector were.

2020 staffing as % of 2019 total

	% in work	% furloughed	% made redundant
Attraction	71%	28%	3%
Serviced accommodation	61%	28%	5%
Non-serviced accommodation	76%	50%	4%
Retail	79%	49%	3%
Food & drink	84%	45%	<0.5%
Activity / experience provider	58%	66%	9%

8. Anticipated length of recovery following lifting of restrictions

Nearly half of businesses (49%) thought they would reach their previous levels of business immediately or within three months of COVID restrictions being lifted. 20%, however, thought it would take longer than a year. Different business sectors show different levels of optimism, with 75% of retail businesses expecting to be back to normal trading levels immediately or within 3 months, compared with only 25% of activity/experience providers.



9. For further information:

www.exmoor-nationalpark.gov.uk/tourism

Dan James
Rural Enterprise Manager
Exmoor National Park Authority
RuralEnterprise@exmoor-nationalpark.gov.uk

Cathy James
Director (Wales)
Global Tourism Solutions (UK) Ltd
cj.gtsuk@btinternet.com

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