



Exmoor Visitor Economy COVID-19 Impact Survey Report

March 2021

Background

The COVID-19 pandemic has caused delays and gaps in tourism data provision for 2020. To address this GTS (UK) Ltd have liaised with clients to carry out online surveys of tourism businesses, assessing the impact of the pandemic on capacity and performance.

The Exmoor survey was conducted between February 10th and March 15th 2021. 123 responses were received (although not all answered every question). The results are summarised below. Full data tables are available on request.

Q1 Where is your business located?

Area	Number of responses
Within Exmoor National Park	76
In Greater Exmoor (within 10 miles of the Park Boundary)	39
Outside the Exmoor area	6

Due to the small size of the “Outside the Exmoor area” sample, analysis of the results by area in this report just includes the responses from “Within Exmoor National Park” and “In Greater Exmoor”.

Q2 What type of business do you run?

Business type	Number of responses
Indoor attraction / visitor facility	4
Outdoor attraction / visitor facility	13
Serviced accommodation	40
Self-catering accommodation	37
Caravan & camping accommodation	4
Hostel or group accommodation	4
Retail	14
Food & drink outlet	17
Activity / experience provider	11
Other	16

(Some respondents had more than one business type so the total is more than 123.)

The “Other” responses were:

- Birch products
- Building contractor

- Business support
- Charity
- Distillery
- Farm
- Fish farm
- Garage – motor repairs & servicing
- Historic House tours
- Kennels
- Paper manufacturing
- Petrol station
- Private toll road
- Therapies & day retreats
- Transport
- Wedding venue

Due to the small sample sizes for some business types, analysis of the results by business type in this report uses the following groupings:

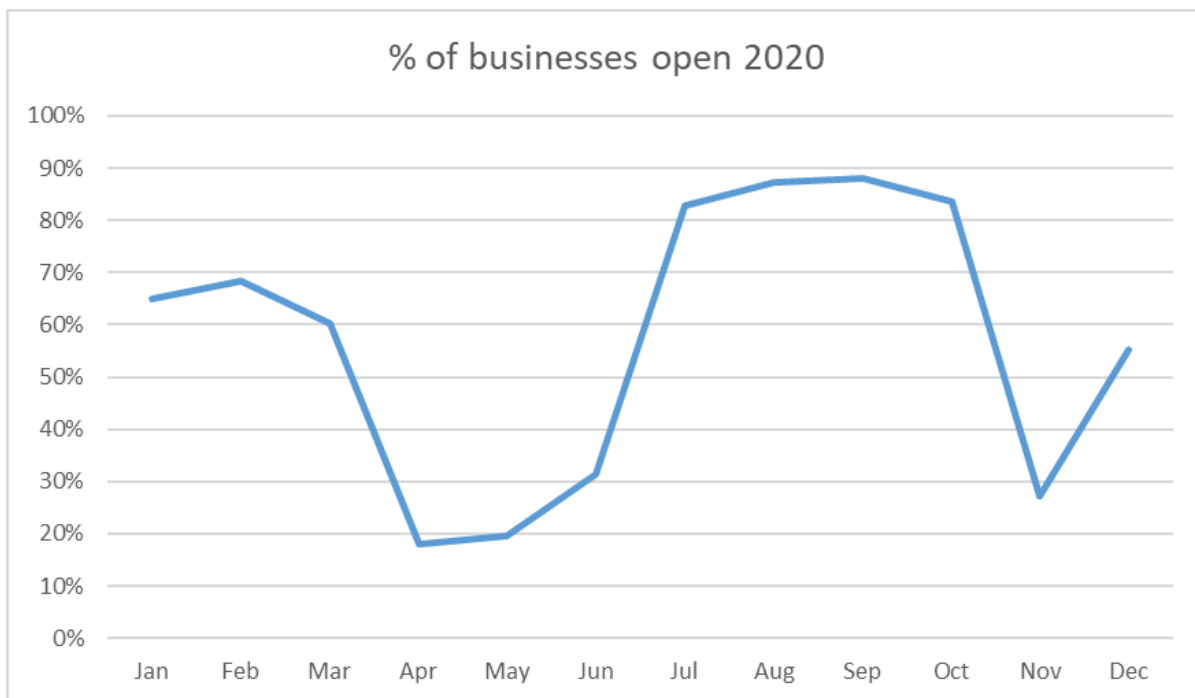
- Attractions (*Indoor attractions & Outdoor attractions*)
- Serviced accommodation
- Non-serviced accommodation (*Self catering, caravan & camping, hostel or group accommodation*)
- Retail
- Food & drink outlet
- Activity / experience provider

Q3 For each month of 2020, at what percentage of your usual capacity were you operating?

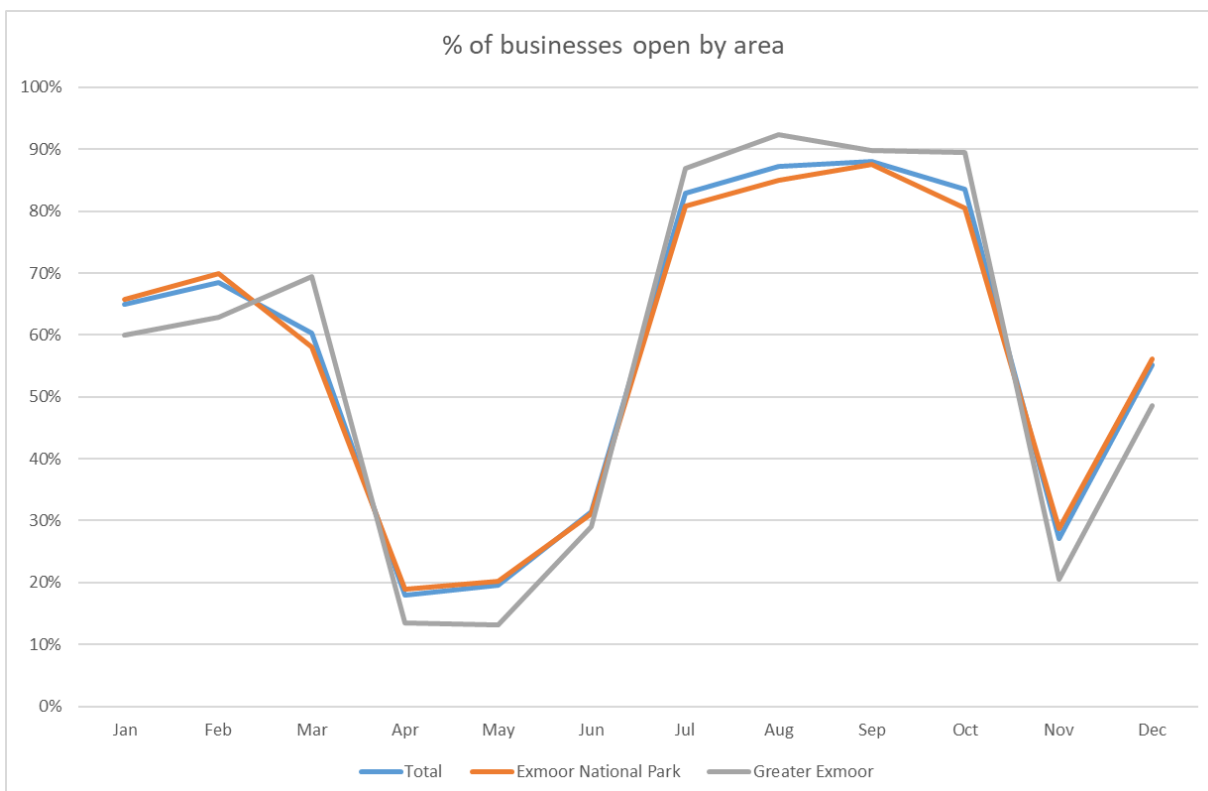
For each month respondents were asked if they were closed all month, or if they were open then at what percentage of their capacity they were operating.

a) Businesses open

Overall, the percentage of businesses open fell to a low of 18% in April, recovering to 88% in September before falling again to 27% in November and 55% in December.



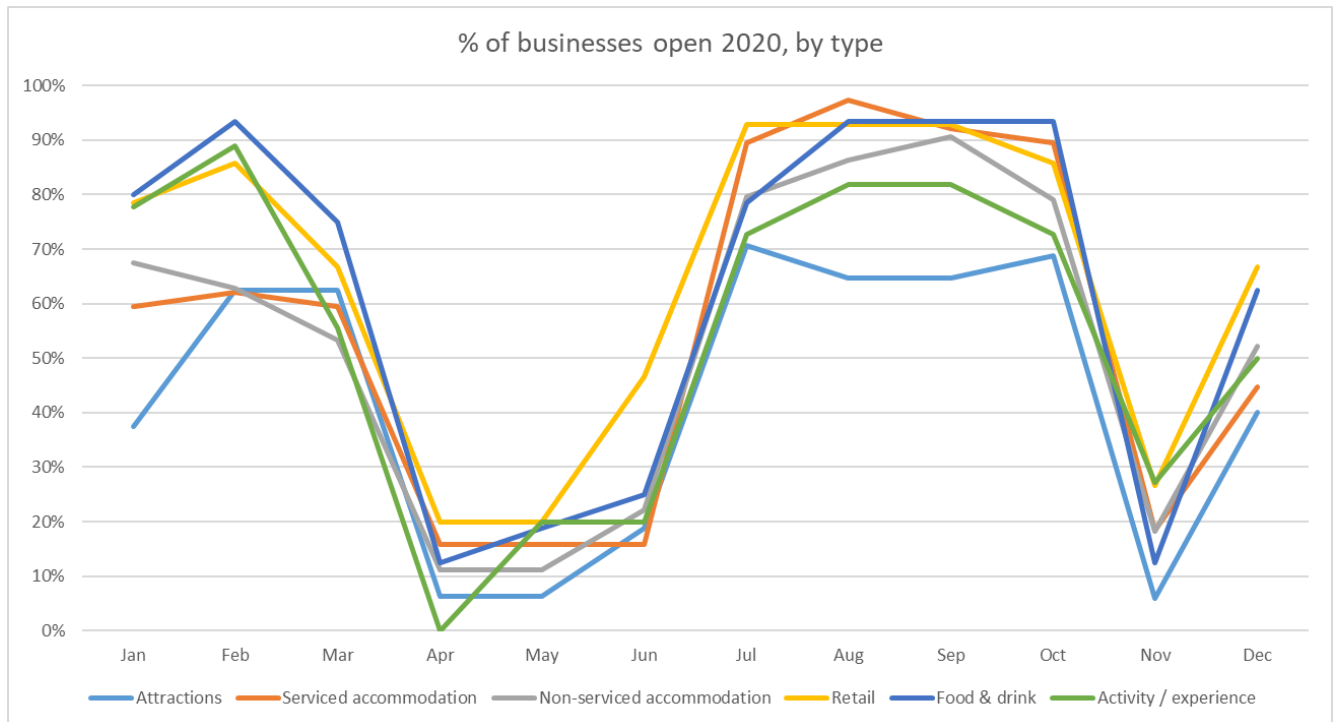
A very similar pattern of openings was seen across the National Park and Greater Exmoor areas. On average across the whole year for all responses 57% of businesses were open. For the National Park the average was also 57%, while for Greater Exmoor it was 56%.



Business type had a stronger impact on the percentage of businesses open, mainly due to the different levels of restrictions applied to different sectors. The attraction sector was particularly badly affected, with only 6% of businesses open at all in April and May and only recovering to a maximum of 71% open in July. In contrast the retail sector only dipped to a low of 20% of businesses

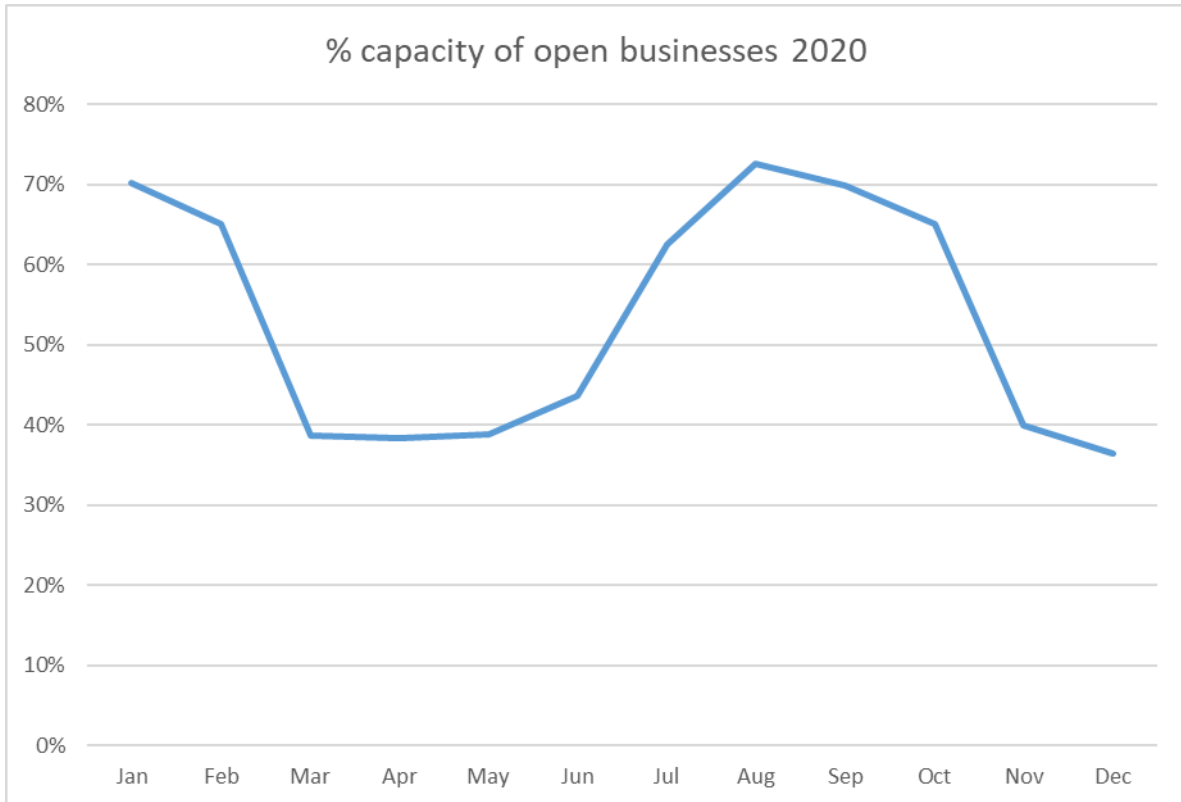
closed in April and May, with 93% open during the July-September period. The average number of businesses open for the year was:

- Attractions: 42%
- Serviced accommodation: 55%
- Non-serviced accommodation: 53%
- Retail: 65%
- Food & drink: 62%
- Activity / experience: 54%

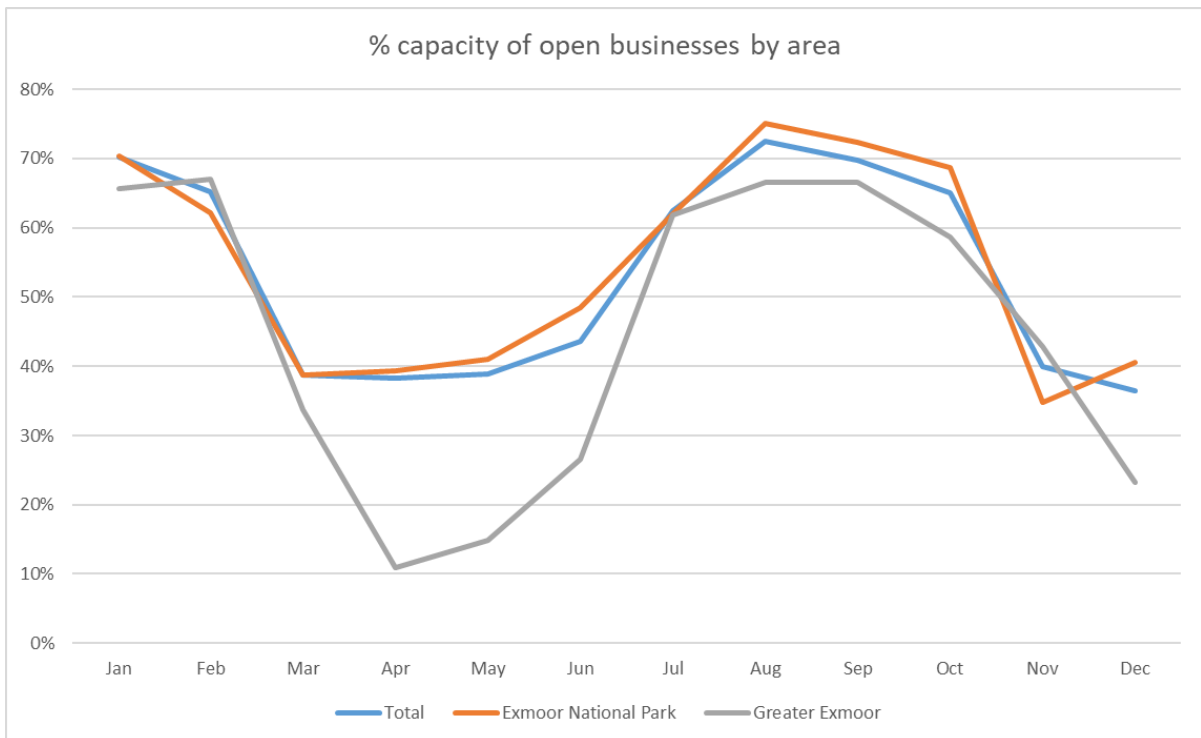


b) Capacity of open businesses

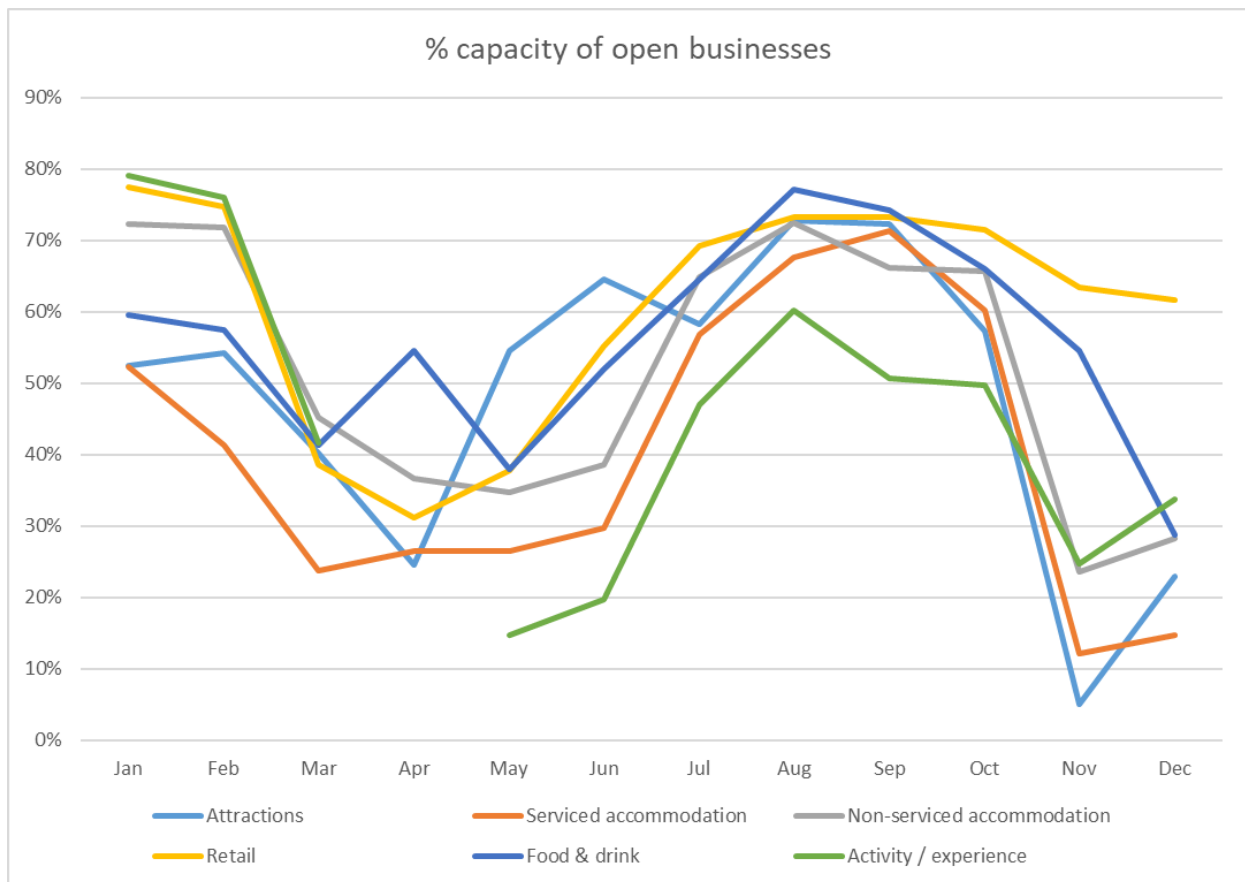
For the businesses which remained open, capacity fell to an average 38% of 2019 levels in April, rising to a high of 73% in August before tailing off again. On average through the year, businesses were operating at 53% of their 2019 capacity.



There was a significant difference in capacity between businesses within and outside the National Park. Within the National Park, capacity compared with 2019 fell to a low of 39% in March and April then recovered to 75% in August. In the Greater Exmoor area capacity was at only 11% in April and the highest level reached was 67% in August and September. On average through 2020 businesses within the National Park were operating at 54% of their 2019 capacity while in the Greater Exmoor area the figure was 45%.



As with the percentage of businesses open, business type had an impact on capacity.



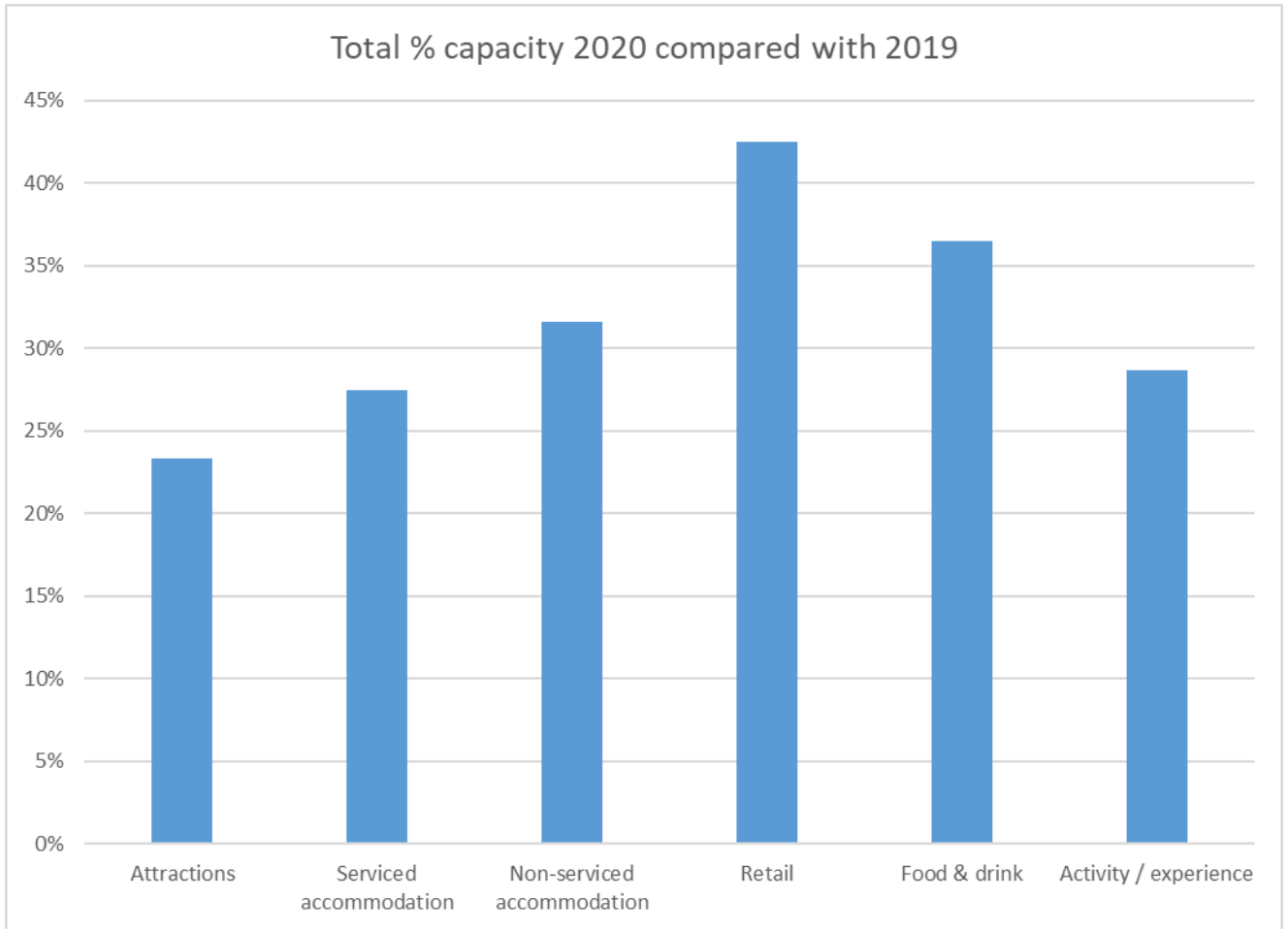
The food and drink outlets which were opened were able to reach a capacity of 77% in August. Activity and experience providers saw a maximum capacity of only 60%, in July.

Averaged across the year, the capacities of open businesses in different sectors were:

- Attractions: 48%
- Serviced accommodation: 40%
- Non-serviced accommodation: 52%
- Retail: 61%
- Food & drink: 56%
- Activity / experience: 45%

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 the sector only had 23% of its 2019 capacity in 2020. 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.



Q4 Visitor numbers for 2020

Respondents were asked if they could provide annual or monthly visitor figures for 2020. 34 were able to provide monthly figures while 74 provided annual figures.

The sample size for monthly figures was too small to provide separate analysis by business type. Instead, the monthly figures were totalled to give annual figures which were added in to the annual analysis by business type.

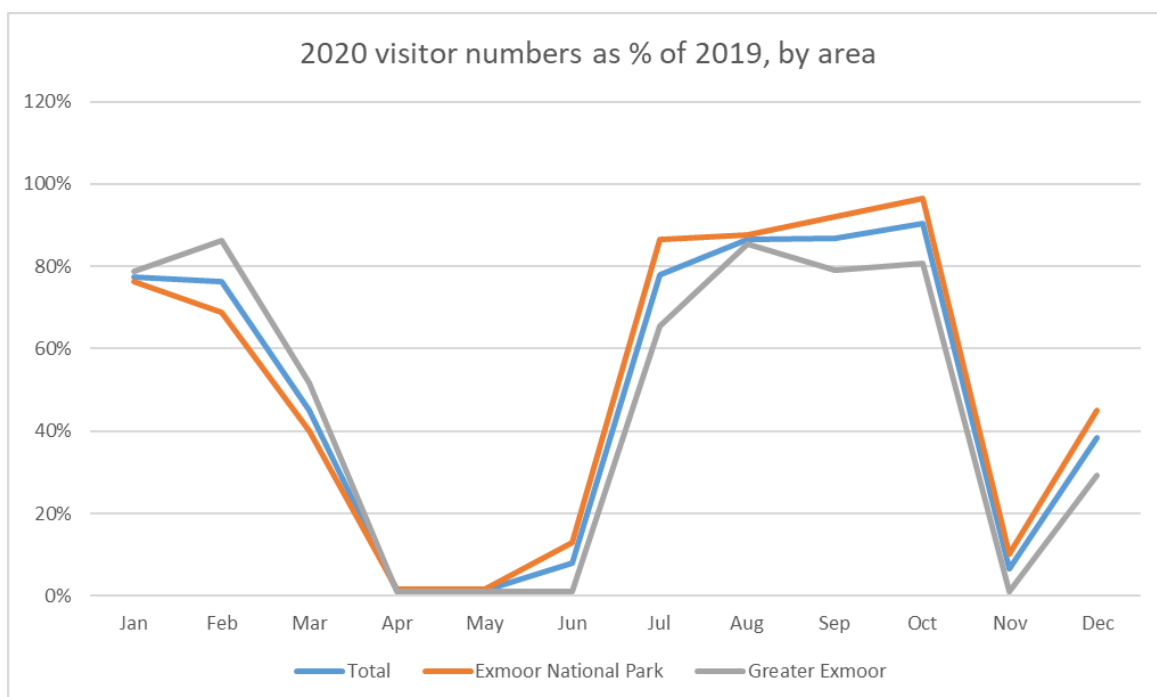
Where a business was closed for a particular month the visitor figure was taken as zero, so the following analysis shows the overall effect on visitor numbers, including closed businesses.

Q5 For each month, how did your visitor figures compare with 2019?



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.

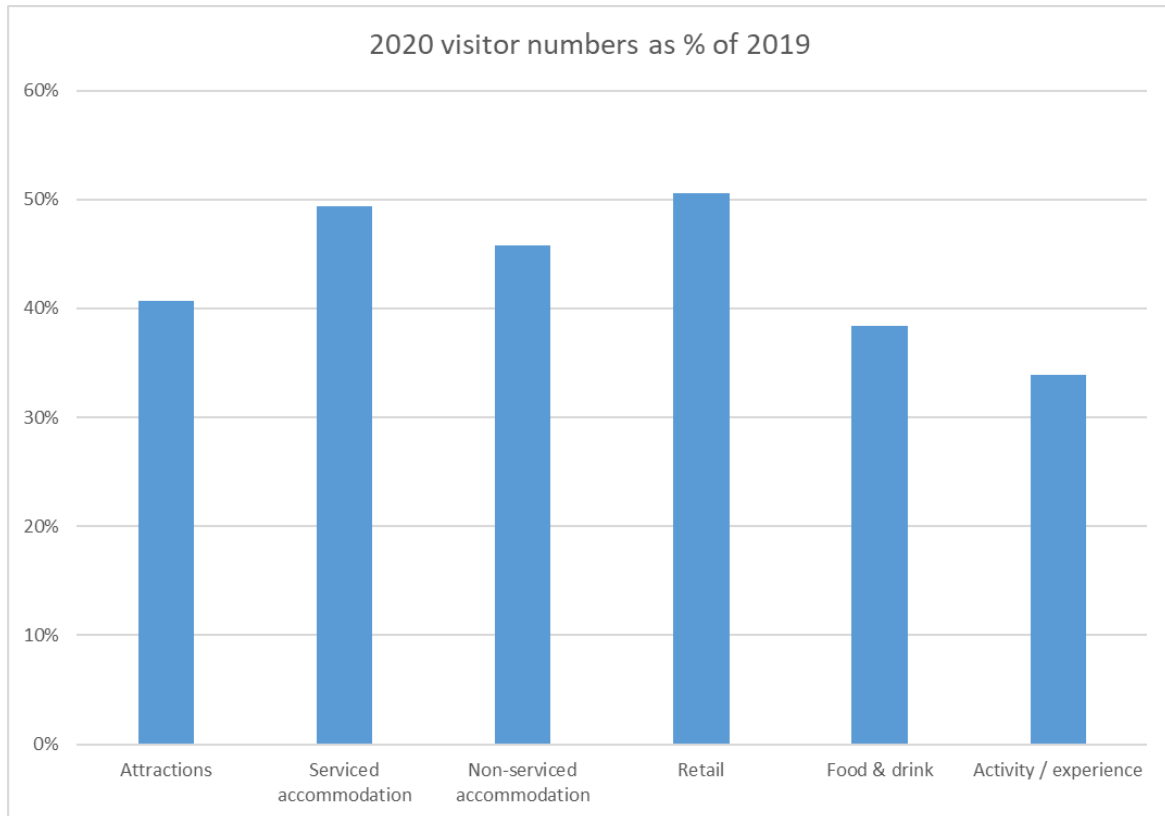
There was little difference in this pattern by area, although numbers in Greater Exmoor started off at a higher level, took a little longer to recover and only reached a high of 85% in August before falling again. In the National Park the numbers continued to grow to a maximum of 97% of the 2019 figure in October.



Q6 For 2020, how did your annual visitor figure compare with 2019?

On average, businesses received 49% of their 2019 visitor figure in 2020. The figure was 47% within the National Park and 51% for Greater Exmoor.

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%.

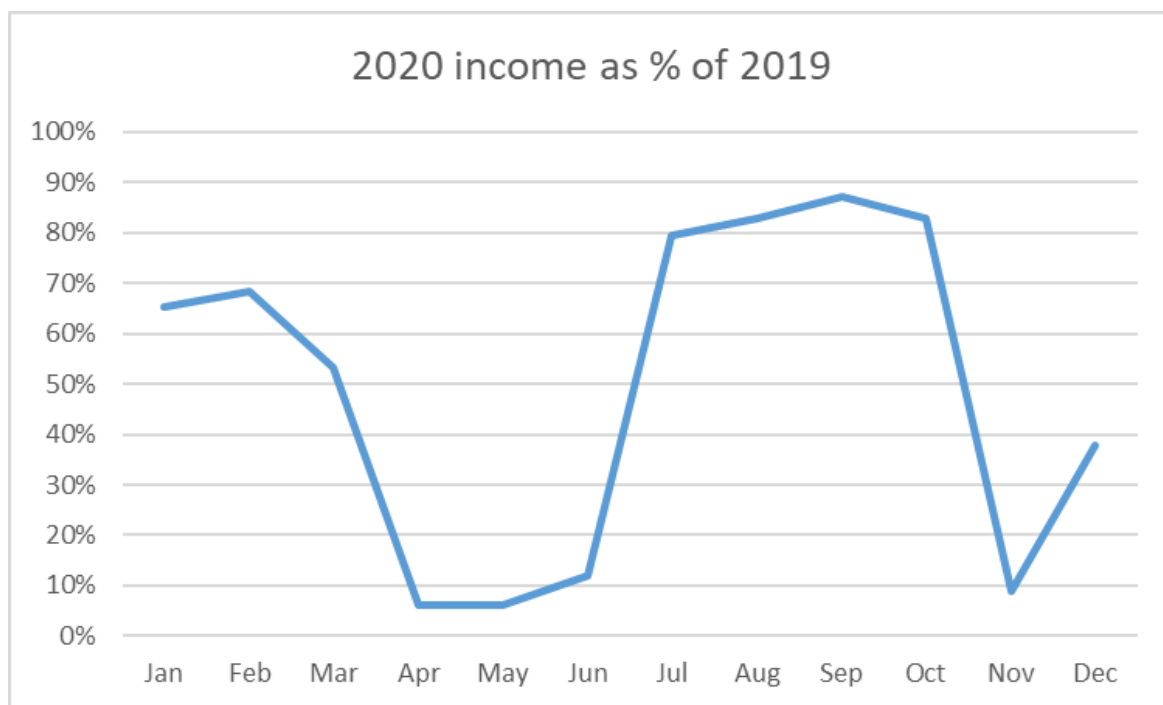


Q7 2020 visitor income

18 respondents provided monthly figures while 80 provided annual figures. The sample size for monthly income was too small to provide separate analysis by area or business type. Instead, the monthly figures were totalled to give annual income figures which were added in to the annual analysis by area and business type.

Where a business was closed for a particular month the income was taken as zero, so the following analysis shows the overall effect on visitor income, including closed businesses. (The survey question specifically asked about visitor income, excluding the effects of government grants and other external support).

Q8 For each month, how did your visitor income compare with 2019?



As would be expected, visitor income showed a very similar pattern to visitor numbers, with the year starting at a lower level than 2019, falling to a low of 6% in April and May, then peaking at 87% in September.

	Visitor number as % of 2019	Visitor income as % of 2019
January	77%	65%
February	76%	68%
March	45%	53%
April	1%	6%
May	1%	6%
June	8%	12%
July	78%	79%
August	87%	83%
September	87%	87%
October	90%	83%
November	6%	9%
December	38%	38%

Q9 For 2020, how did your annual visitor income compare with 2019?

In total, tourism businesses in the area received an average 50% of their 2019 visitor income in 2020. There was some variation by both area and business type.

As with visitor number, there was little difference by area, with businesses within the National Park receiving 51% of their 2019 income and businesses in Greater Exmoor receiving 46%.

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%

Q10-13 Staffing levels

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.

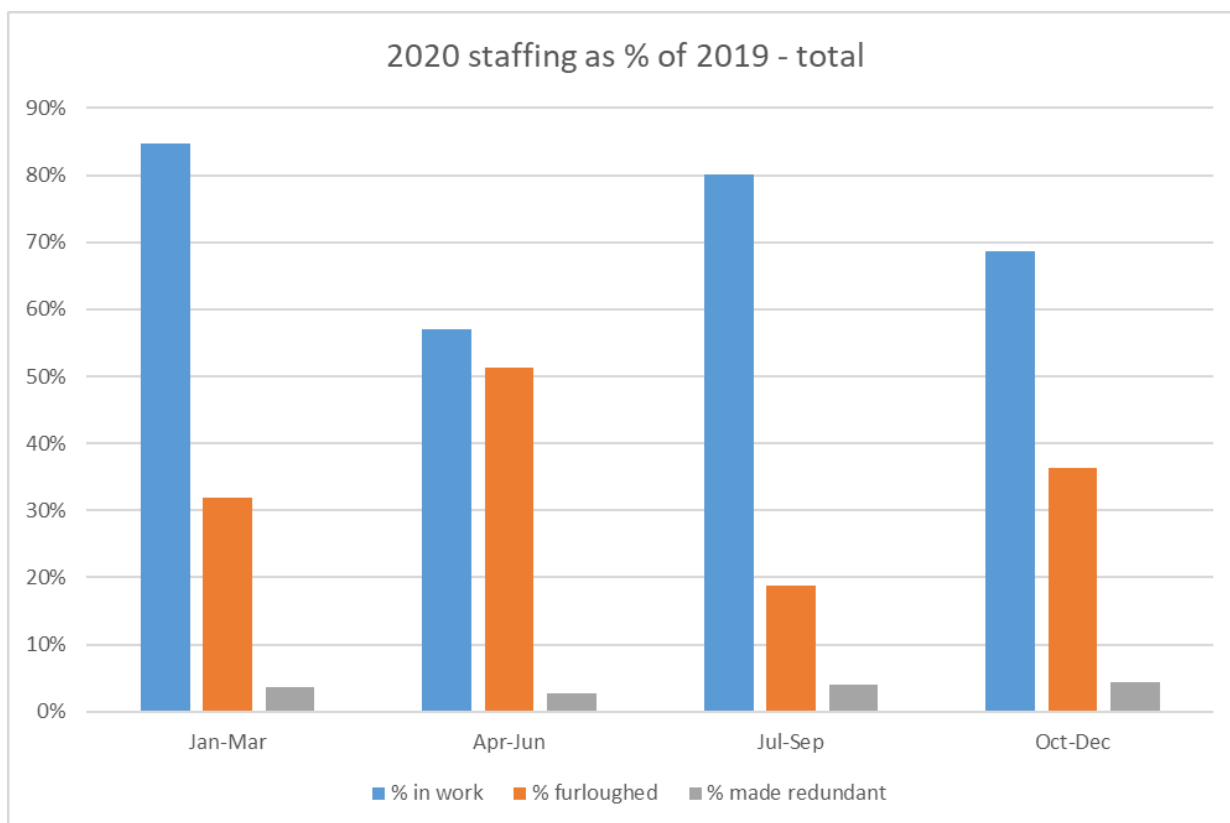
From the responses of a number of businesses there seems to have been some double-counting between the “in work” and “furloughed” categories, probably reflecting the fact that staff were in work for part of the quarter but furloughed for the remainder. This means that sometimes the quarter totals add to more than 100%.

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 from these figures is the low level of redundancy, probably due to the use of the furlough scheme.



Annual averages

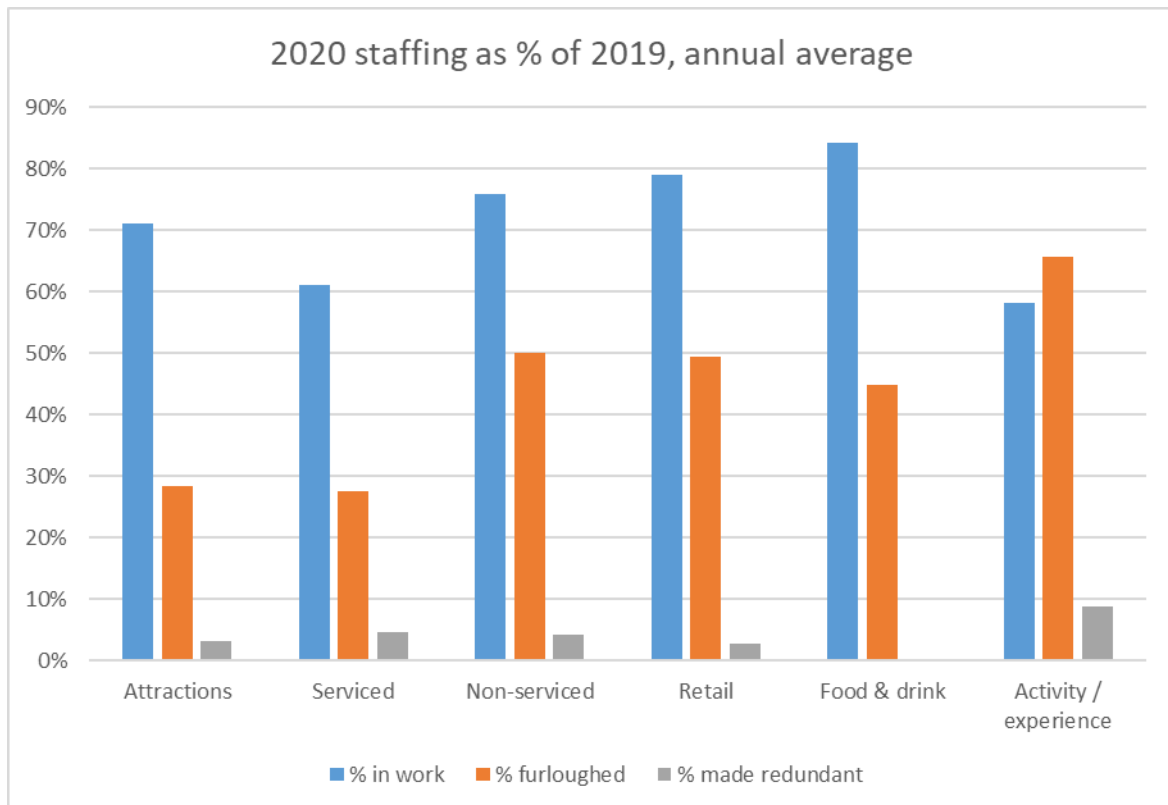
Looking at the annual averages for employment figures there was little difference between the National Park and Greater Exmoor, although businesses in the National Park seem to have made more extensive use of the furlough scheme.

	2020 staffing as % of 2019 total		
	% in work	% furloughed	% made redundant
Total	73%	34%	4%
Exmoor National Park	72%	42%	4%
Greater Exmoor	75%	21%	3%

There were more 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%

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



Q14 Do you have any ideas for the recovery of tourism on Exmoor that can be considered by the Exmoor Tourism Response and Recovery Network?

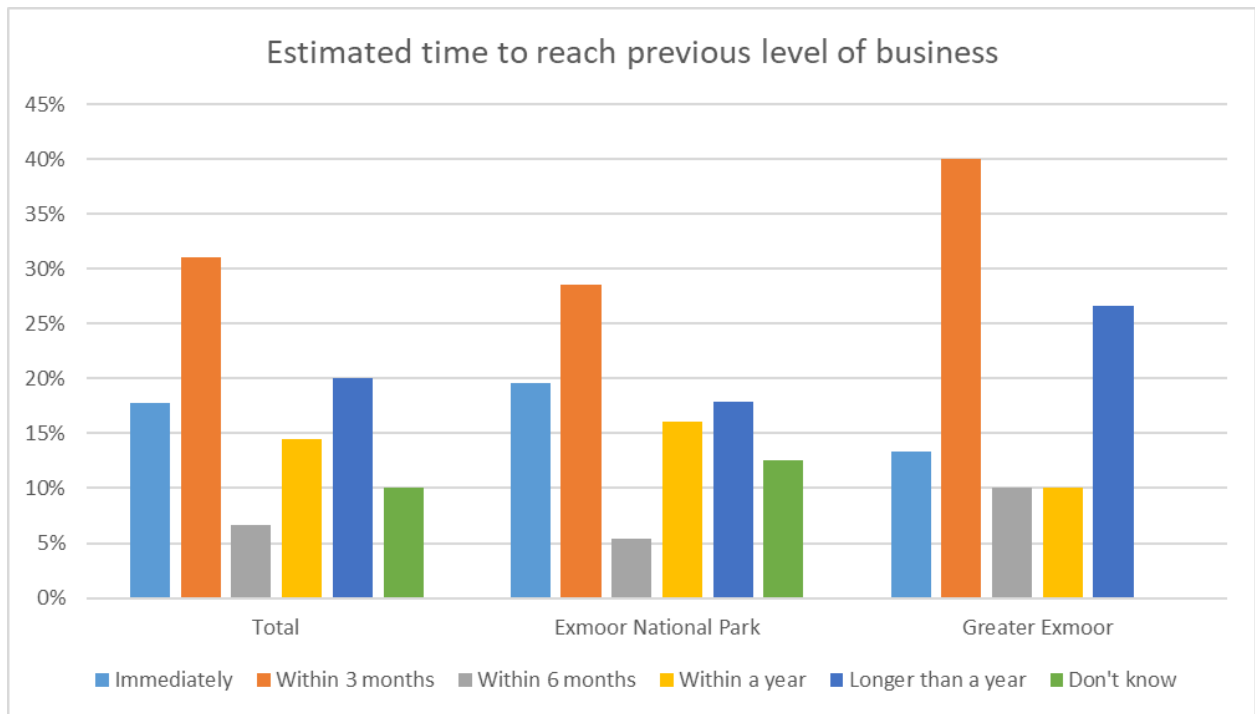
Q16 Do you have any general comments you'd like to make about the impact of COVID-19?

76 businesses responded to these questions. The answers are contained in a Excel spreadsheet appendix to this report.

Q15 When the current COVID restrictions are lifted, how long do you think it will take to reach your previous level of business?

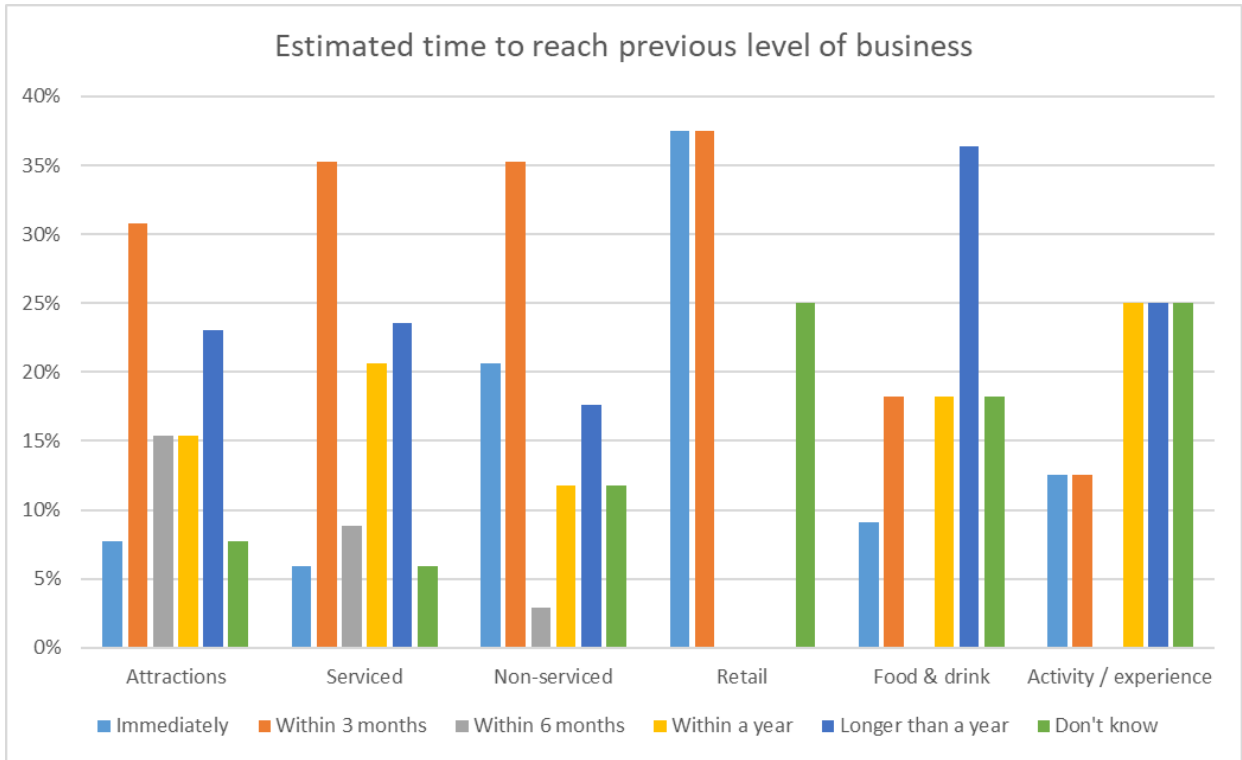
Nearly half of businesses (49%) thought they would reach their previous levels of business immediately or within three months of COVID restrictions being lifted. 20%, however, thought it would take longer than a year.

	Estimated time to reach previous business levels after restrictions					
	Immediately	Within 3 months	Within 6 months	Within a year	More than a year	Don't know
Total	18%	31%	7%	14%	20%	10%
Exmoor National Park	20%	29%	5%	16%	18%	13%
Greater Exmoor	13%	40%	10%	10%	27%	0%



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.

	Estimated time to reach previous business levels after restrictions					
	Immediately	Within 3 months	Within 6 months	Within a year	More than a year	Don't know
Attraction	8%	31%	15%	15%	23%	8%
Serviced accommodation	6%	35%	9%	21%	24%	6%
Non-serviced accommodation	21%	35%	3%	12%	18%	12%
Retail	38%	38%	0%	0%	0%	25%
Food & drink	9%	18%	0%	18%	36%	18%
Activity / experience provider	13%	13%	0%	25%	25%	25%



If you would like any further information or additional data for this research project please contact:

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Appendix 1 – Open text response to questions 14 and 16

(responses reproduced as provided without editing. Those stating N/A, nothing to add etc have been removed for ease of ref)

Q14 Do you have any ideas for the recovery of tourism on Exmoor that can be considered by the Exmoor Tourism Response and Recovery Network?

- Encourage more local young people to participate on Exmoor. Positive young people communicate on social media with their peers to influence positivity and feel-good factor. Employ teenagers during the summer holidays as Exmoor Teen Rangers to get them enthused about the area and spread the word.
- More guided and arranged activities that people can engage with. Guided walks, tours, sporting activities and trails.
- Important to keep Exmoor in the public eye and remind people of the beauty of the area and the outdoor experience
- Need to get hospitality up and running ASAP
- Strong advertising, toilets and car parks open. Happy to receive polite customers not what arrived in Aug 2020
- Encourage more visitors to spend more money !
- Not needed. As soon as the lockdown / tier is lifted people will flock back.
- Yes I think some clarity will be essential going forward. Being clear for example that groups above say 10 defiantly won't be allowed to go on holiday together this year will be better than leaving things open ended. That weddings above a certain number won't be happening will give people at least a chance to limit their expectations. Promoting ideas that are least likely to be impacted by tier restrictions. Encouraging from now people to book within their own counties to allow for tier restrictions. Constantly having to find new customers just to cancel or move their holidays and weddings is eroding relations between customers and the industries. We found people were not very tolerate at all once the lock down has ceased last year. Most people in the industry I spoke to had awful experiences with customers accusing venues of being pedandict and making the virus an excuse. The general public had and still have no idea how the tourism and wedding industry have been affected.
- Ensure that all visitors are aware of their responsibility in respecting not only the environment but the residents as well as other visitors.
- Government investment in major capital projects to offset the loss of EU funding
- People will come back naturally to pre Covid levels, using the previous advertising.
- voucher scheme similar to Minehead
- It will naturally come back no need to over think it, stay cactions will be the new normal
- Broaden your advertising of the whole NE Somerset to openly include The Quantocks and Brendon Hills where many inviting attractions lie. Spreading news of the whole area will surely offer a greater exposure to many more potential customers.
- Reduced cost holidays for front line workers
- Listen and let business expand if needed.
- Intensive advertising to direct tourists to Exmoor and promote Exmoor as a premier tourist destination
- A large eco indoor attraction suitable for all weathers to bring us more visitors outside the peak season. I wish we had something like the Eden Project on Exmoor! Our repeat guests are slightly tired of visiting Dunster Castle and Tarr Steps etc. I find it hard to keep them coming as good walks alone aren't enough.
- Increased marketing/promo of Exmoor as a destination for adventure, health and well-being.
- Not any more tedious questions
- Marketing and promotion of the park as a destination for new UK tourists, not just those that like walking and afternoon tea!
- Lobby for continuation of rates holiday and reduction in Vat
- Publicity, publicity and more publicity. Targeted at groups we can satisfy their expectations ie Outdoor activities, foodies (in Lynton we have excellent eateries for a remote location). Park and Ride, better public transport (many of our guests do not want to use the car once they are here). Target Birmingham, Bristol, London that's the general distance the English will travel from. The English will use their car more (pre Covid 50% of guests were from abroad). The English are more demanding!
- Events to raise the profile. A golf course on the moor!
- Encourage more guests to book direct and NOT through Online Travel Agencies
- Until the pandemic is beaten, it is impossible to re-open
- Open accommodation ASAP and retail - the rest will follow - it will be a good year.....
- Better public transport.
- Integrate marketing to attract visitors to the area with ND Marketing Board, Visit Devon etc. Make ENPA respond quicker to planning applications that will improve tourism, we have minor applications that have taken more than 14 months to decide.
- Making area look more attractive to tourists-even before covid there has been a lack of floral displays etc in recent years.
- End lockdown
- Easier/cheaper/more parking. Promote off season
- Keep it authentic Stop putting info boards up we're not Disneyland! Understand the demographic of visitors Improve transport for walkers/cyclists I.e uplifts Improve digital solutions for tourist information Quality not quantity of visitors make it functional
- lots of lovely inspiring images on social media!
- Better signage, more public footpaths, less red tape and more investment and support for hospitality and activity providers on Exmoor

- National advertising, all the usual stuff
- Increase longer stays rather than short breaks. Encourage all year opening.
- maybe look at short days / getaways for local's rather than reaching outside of Exmoor
- Advertising
- Open up and promote Exmoor so visitors come here not head off down to Cornwall.
- News today not good don't book even staycation 🙄🙄
- promote local where ever possible, more local support would ensure income all year round
- Ask government to support a clear message for visitors to understand their responsibility to keep covid cases in national parks low as possible to allow the small businesses to continue
- Yes- speak to TV companies about getting us featured in the plethora of travel programmes currently on. Everything is focussed on Cornwall. We need marketing, instagram - use some influencers to get the figures visiting up. So many people last year came to Exmoor because they couldn't get into Cornwall! They commented they had never concerned it before!
- Open Spaces strategy supports social distancing while still having fun
- Continuation of 5%VAT would help as would extension to business rates and furlough scheme beyond April
- Promote all Exmoor businesses for free to as many places as you can, activities need to be given a priority as accommodation will naturally fill in summer months provided we are open.
- Promote the wide open spaces of Exmoor to the crowded city folk.
- Get more press / media coverage with increased PR work Find interesting storylines / historical or themes from novels to promote the area - Rosamund Pilcher is bringing a boom to Cornwall yet Lorna Doone is almost unknown. Contact Derek Purvis of Porlock and publicise the history of Exmoor Seafarers and our association with Treasure Island
- TV program based on Exmoor, either a Joanna Lumley styleseries, a Lorna Doone drama series, a detailed Exmoor National Park set of documentaries based on working, living, wildlife, walking, riding, fishing, history etc A push on staycations, safety of the UK holiday
- Inclusive Festivals are a good idea - it's a great way to present events and activities with a theme and a better chance of getting good publicity. It builds focus and interest over time. I'd like to see a return to ENPA spearheading things like the original Exmoor Pony Festival, which effectively promoted the Exmoor ponies of Exmoor National Park. Festivals can roll out over all kinds of areas. Perhaps we could look at creating one that embraced Environment, Conservation, Climate Change - ie, what Exmoor National Park is doing to make the world a better place. Could embrace farming, tourism, flora and fauna, activities, etc. So much potential!
- Simply, working together to promote Exmoor as a safe place to visit and escape the everyday.

Q16 Do you have any general comments you'd like to make about the impact of COVID-19?

- I hope going forward people will consider the environment that they live in and take care of it more.
- Shows what is truly important
- As a small charity we saw a reduction in members and donations
- interventions/lockdowns implemented too late and arrivals from abroad (for any reason) not isolated from the outset let alone covid tested
- The country wide impact is huge. And is going to cost all of us more in the future
- Covid restrictionists are killing our business
- As fine art manufacturers we have been busier than ever but have had to expand on our production area which initially slowed production and is costing more to run in heating / engery etc..
- When lockdown lifted there will be a massive influx of customers. We will be delighted to have full time staff again as we have been here for the last 12 months with no time off. We wanted to ensure that we served our local community and kept them safe
- Financially and Domestically its a Devastating impact on our rural economy !
- If people had stuck to the rules, especially last Summer and Christmas, we would not be in this mess now.
- Sorry made them earlier I think. I has nearly ruined our business, it may still depending on what happens next. It has had a huge impact on the mental health of our entire family and workforce. We have constantly tried to adapt to stay in business within the ever changing rules just to find we're cancelling bookings anyway.
- Wouldn't have survived without the govt grants. Very concerned about return to business as many visitors were extremely aggressive last year with little respect for myself or the community. The worst refused to comply with covid safety measures. These measures will need to remain at least for this season.
- Not good for businesses on Exmoor due to the interrelationship of all tourism based businesses
- As a self employed one man business, my earnings dropped to zero, as i am a small business i couldnt claim anything.
- The lack of support for small businesses with no business premises has been appalling.
- devastating and definitely avoidable
- Unexpected, hopefully the British population will of learnt from it but early indications is doubtful
- If we did not have personal incomes and the grants the business may well have gone under
- Effected our volunteers as well
- General uncertainty about 2021,when will we be able to open and dare we take any bookings even for the Summer
- Without government grants during lockdown and tier 3 my savings would have gone to cover bank loan on property
- Covid - no impact personally, or to those I know Lockdown - devastating impact
- Just about everyone (including yourselves) have been shown to be big on ideas but fall way short on

delivery. This survey is just work creation for the Exmoor Tourism people to keep them in a job. Buggerall ever happens.

- really bad for my business was not able to take visitors then the influx of litter dropping ghastly people ruined my summer
- If we miss another season we're toast - halved our business
- Devastating. But long term...very hopeful and a new way of living for the world.
- If we can finally defeat covid then it might have actually improved tourism for the area with the increased popularity and in some cases necessity of staycations
- Hit us hard, no business grants as not business rated, had to take second jobs to survive,
- Try and remember that folks have been kept on a tight lead for months and some are bound to be a bit stir crazy.
- I think its made everyone appreciate the natural beauty on peoples doorsteps
- Huge mental health issues
- It is confusing about when we can start to take bookings again
- Roll on the vaccines and hope they work
- The difficulty or not being able to plan for the future and therefore cannot spend money to make improvements as you do not know if you will make enough money whenever you can open.
- We need to look at diversifying away from tourism. You need to look at different options and allow business back into the park.
- When open most guests fully support guests and owners COVID safety measures - the marketing must promote a joint approach - not just hosts looking after guests

- It has been horrific being new owners of a premise, but due to location and work we have put it we are successful and will be able to reopen
- For us as many small businesses the uncertainty has often created negative stress and despair and the thought "is keeping going worth it"
- Because we are inexpensive accommodation with shared facilities we have had more severe restrictions placed on us compared with Hotels and B & B's with En-suite.
- It has helped to unite the local community and made us less dependant upon the supermarkets.
- This is a tremendous opportunity to sell UK holidays and get people to realise what they have on their doorstep, the safety factor of the UK. The biggest problem for us for the future is the average guest has a perception that they cancel when they like and that will be economic disaster for us and no insurance is going to take this on
- We need to be sensitive about bringing visitors back to the area too quickly
- It has been devastating for the Exmoor Pony Project and my self-employed author/creative work. However, ENPA is making every effort to help and support people like me and projects like Exmoor Pony Project. We've had the Covid Recovery grant, we're working to claim the Partnership Fund grant - and we've been chosen to join the National Parks Experiences Collection. This gives us inspiration and hope along with some support. I think ENPA is doing a great job in taking an interest and finding constructive ways for people, projects and businesses in the park to survive and thrive after the impact of Covid. Thank you to the whole team.
- Financial support from UK Government has been great, we would obviously rather have been open.