

Exmoor National Park welcomes over 2 million visitors every year. Our wide-ranging special qualities of natural beauty, wildlife, cultural heritage and varied recreational opportunities, offer a special and unique experience.

Tourism accounts for approx. 60% of all employment within Exmoor National Park. GVA (Gross value added) of tourism on Exmoor is 54% of the economy (11% and 12% for Devon and Somerset)*.

- The annual value of tourism to Exmoor's rural economy is approx. **£128m****, supporting over 2,200 full-time equivalent jobs.
- The value for "Greater Exmoor" area (inc. a 10 mile radius around the National Park) is estimated to be **£368m*****.

Initial estimates indicate the annual value of tourism to Exmoor could fall by a third over just the first 3 months of the crisis and the longer term impact will be significantly greater.

All values £ Million	Exmoor National Park**	Greater Exmoor***	
Annual Estimated Tourism Income (based on 2018 estimates)	£128	£404	
Jan - March	£11	£36	Est Pre-COVID
April-June	£38	£122	Lost
July-Sept	£59	£190	At Risk
Oct-Dec	£20	£56	At Risk
Total Potential Impact 2020	£117	£368	

The immediate effect is clear. The actual impact across our businesses will build over the next few months:

Accommodation providers have been hit by a huge volume of refunds with no future bookings (significantly impacting cash flow)

- Some accommodation providers have been further hit by booking agents or accommodation companies taking their booking fees for cancellations (anecdotal).
- Research highlights that accommodation alone accounts for 31% of jobs across Exmoor. ** This is compared to an average of 3.6% and 2.4% for Devon and Somerset, which underlines the severity of impact

Attractions, activity, experience and events companies'

operations have been mothballed with no ability to plan survival and recovery against an unknown timeline and circumstances.

Food and drink establishments have closed and their staff have been furloughed

- Some have adapted to provide take-out/delivery services. This supports basic survival of the business and should not be considered as income replacement. **Note:** many businesses that quickly adapted their models have now shut down realising that their costs are not covered.

Retailers have shut, furloughed staff and shops stand empty.

What does recovery look like?

- A cohesive and agile Response & Recovery Plan - ENPA and Visit Exmoor are leading this. Bringing together all tourism representatives in the area
- **We are stronger together**
 - Working together across regional and UK tourism (e.g. focus on domestic traffic – refuelling our economy from within etc.)
 - All businesses coming together under the Response and Recovery Plan with support from Visit Exmoor DMO
- Detailed impact assessment to all tourism businesses, hearing what is required from the businesses themselves
- Financial support for those not covered by government measures
- Improving our offering, reaching new markets through the positioning of our offering.

The loss of tourism due to government COVID-19 restrictions is having a devastating effect on all tourism-related business on Exmoor (over 700 businesses in total). This impacts:

- Accommodation providers
- Food and drink businesses, including producers
- Retailers
- Attractions, activity, events and experience providers
- Ancillary support services; cleaners, gardeners, distributors, farm shops etc.

At this point it is impossible to predict the exact level of this impact. In addition to the impact to tourism income we know that:

- Businesses will fail
- Jobs will be lost
- The local economy will be devastated and will be in recovery for several years
- The tourism capability developed over decades, will reduce dramatically.

Uncertainty of social-distancing timeline and how restrictions will be removed (e.g. fluctuation/phased approach), gives a further challenge to individual towns, communities and businesses planning their recovery.

