



## The Visitor Economy of Exmoor National Park

This is a summary of the annual tourism economic impact research undertaken for Exmoor National Park for the calendar years 2022-2024. Outputs in this report have been generated using the Scarborough Tourism Economic Activity Model (STEAM), owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19

Estimated tourism figures throughout all of the UK appear to have mostly returned to, or surpassed, pre-Covid 19 estimates for the first time.



# 2024

## Visitor Types

**Staying Visitors** encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

**Day Visitors** visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

**Staying Visitors**

**20%** of Visits

**Day Visitors**

**80%** of Visits

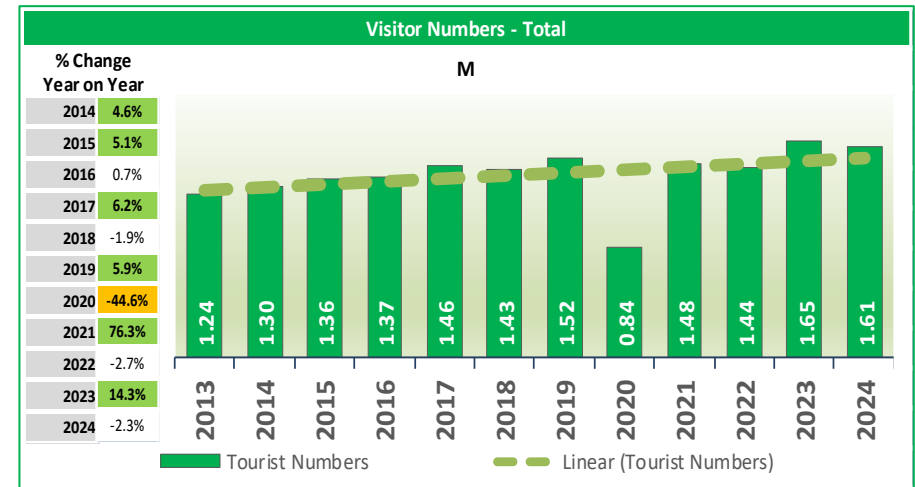
**Total Visitor Numbers**  
**1.6m**

## Visitor Numbers

There were an estimated 1.6m tourism visits to Exmoor National Park in 2024, slightly down by -2.3% from the previous year, mainly due to small decreases across the board; but overall numbers are up 6.1% from estimated pre-covid levels in 2019.

In 2024, .332m visitors stayed in some sort of accommodation within the area. This sector saw a slight decrease of -3.0% when compared to the previous year and is still 9.0% below 2019 levels. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a marginal decrease of -3.6% over the last year, but is -16.6% below 2019

estimates. This is due in part to closures within the B&B and Guest House sector. The much larger non-serviced accommodation sector was down slightly by -2.8% on the previous year and is now -2.9% below 2019 estimates. Day visitors throughout many locations in the UK are just returning to pre-covid levels, especially in rural and semi-rural locations, so it is encouraging to see that although day visitors were slightly down by -2.1% on the previous year, they are above 2019 estimates by 10.9%, which has had a knock-on effect on total visitor numbers as a whole, as day visitors represent 80% of all visitor numbers.



## Key Figures: Visitor Numbers 2024

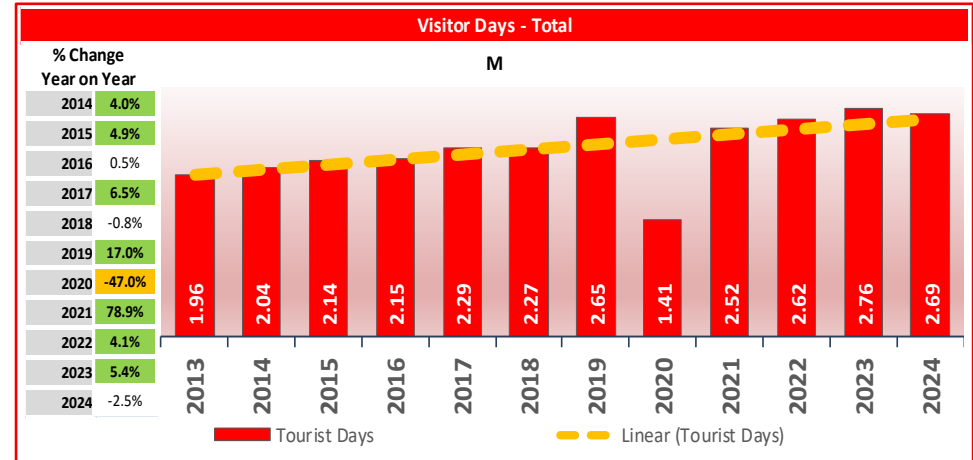
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.135	0.178	0.019	0.332	1.277	1.609
2023 (Millions)	M	0.141	0.183	0.019	0.342	1.305	1.647
Change 23/24 (%)	%	-3.6	-2.8	+0.1	-3.0	-2.1	-2.3
Share of Total (%)	%	8.4	11.1	1.2	20.6	79.4	100.0

**Total  
Visitor  
Days  
2.7m**

## Visitor Days

Visitors spent an estimated 2.69m days in Exmoor National Park during 2024. Visitor days take into account multiple stays. For example, if a family of five stay three nights, they will not only account for five visitors, but also fifteen visitor days. On average, staying visitors to the area stay 4.3 days, which is high when compared to other areas.

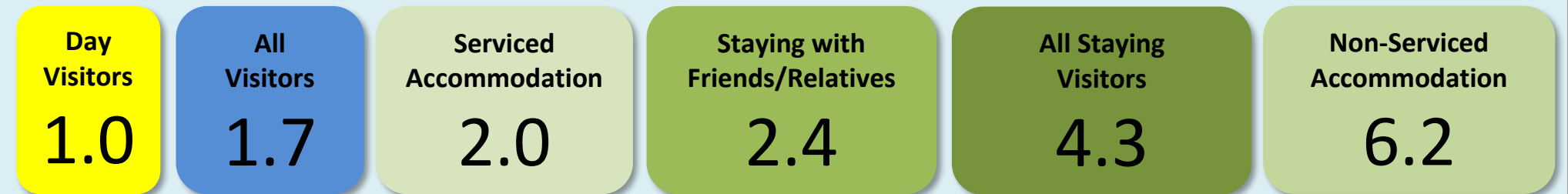
Total staying visitors accounted for 2.7m visitor days in 2024, a slight decrease of -2.5% on the previous year, but 1.4% above 2019 estimates. The serviced accommodation sector decreased slightly by -3.6% when compared to 2023, and is still -16.5% below figures reported in 2019. The larger non-serviced accommodation sector was also marginally down by -2.8% on the previous year and is -3.0% below 2019 levels. Again, this is partially due to decreases in serviced accommodation establishments and bedspaces over the past years. As mentioned before, day visitors to the area were slightly down -2.1% on the previous year, but up 10.9% on 2023, a good result when compared to other areas, and especially given the predominance of the day visitor sector to Exmoor National Park.



### Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.270	1.099	0.044	1.413	1.277	2.690
2023 (Millions)	M	0.280	1.131	0.044	1.455	1.305	2.760
Change 23/24 (%)	%	-3.6	-2.8	+0.1	-2.9	-2.1	-2.5
Share of Total (%)	%	10.0	40.9	1.6	52.5	47.5	100.0

### Average Length of Stay for Different Visitor Types: 2024



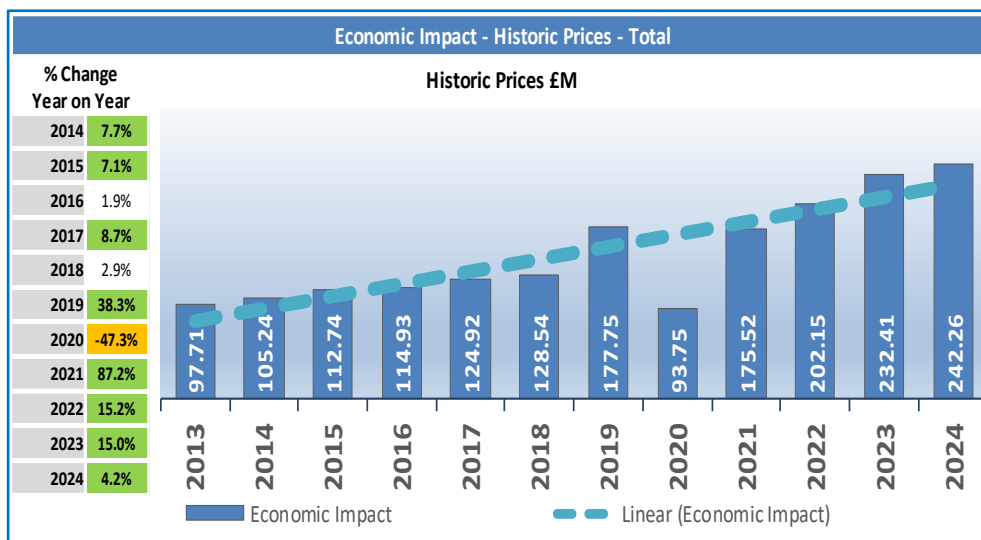
**Total  
Economic  
Impact  
£242m**

## Economic Impact

The value of tourism activity in Exmoor National Park was estimated to be £242m in 2024, up by 4.2% on the previous year, and up by 2.0% (indexed for inflation) when compared to 2019 estimates.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £176.9m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £65.3m, together totalling £242m. The largest

visitor spending sector was Accommodation (£66m), followed by Shopping (£41m), then Food & Drink (£37m,) followed by Transport (£19m). The economic impact of the serviced accommodation sector was up slightly by 3.3% on the previous year. The much larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up by 5.3% on 2023. In terms of comparison, the non-serviced sector has around three and half times more bedspaces than the serviced sector and has about the same increase in economic impact. Day visitor economic impact is up 2.7% on the previous year and is now 10.9% above 2022 levels when indexed for inflation; its economic impact is half that of visitors staying in non-serviced accommodation.



- Accommodation:** Payments for overnight stays in accommodation, such as room rates, pitch fees and hire charges for non-serviced accommodation
- Recreation:** Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions attendance as well as sports participation and spectating.
- Transport:** Expenditure within the destination on travel, including fuel and public transport tickets
- Food and Drink:** Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries
- Shopping:** What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items
- Indirect:** The expenditure by local tourism businesses within the local supply chain

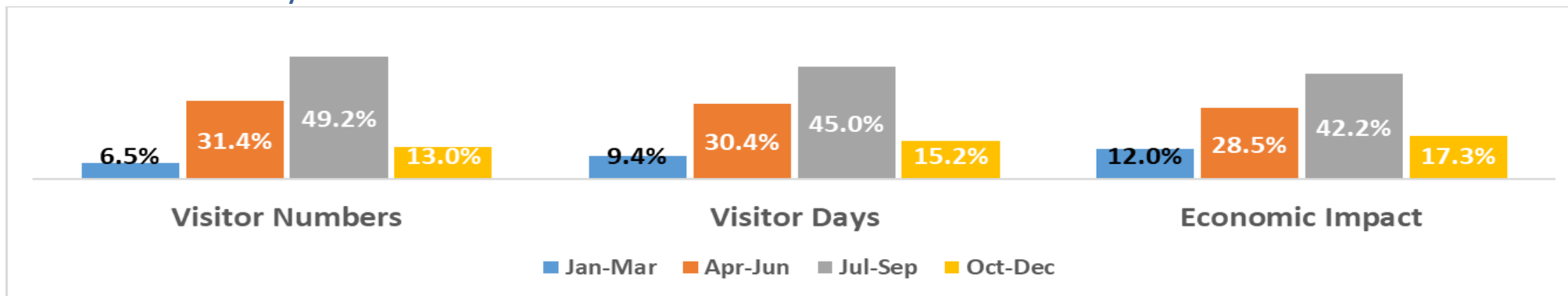
### Key Figures: Economic Impact 2024 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Millions)	£M	38.089	134.771	3.039	175.899	66.358	242.256
2023 (£ Millions)	£M	36.875	128.011	2.893	167.779	64.630	232.409
Change 23/24 (%)	%	+3.3	+5.3	+5.1	+4.8	+2.7	+4.2
Share of Total (%)	%	15.7	55.6	1.3	72.6	27.4	100.0

### Average Economic Impact Generated by Each Type of Visitor: 2024

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£ 141.26	£ 122.58	£ 68.60	£ 124.45	£ 51.97	£ 90.05
Economic Impact per Visit	£ 281.14	£ 757.47	£ 163.25	£ 529.79	£ 51.97	£ 150.57

### Seasonal Distribution of Key Visitor Metrics: 2024



**Total  
FTEs  
Supported  
2,377**

### Employment Supported by Tourism

The expenditure and activity of visitors to Exmoor National Park supported a total of 2,377 Full-Time Equivalent jobs (FTEs) in 2024; a slight decrease of -6.0% on the year before.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 1,859 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 518 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 837 FTEs, followed by Food & Drink at 380 FTEs, followed closely by Shopping at 379 FTEs, followed by Recreation at 175 FTEs.

### Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2024

Employment Supported by Sector 2024	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	837	380	175	379	89	1,859	518	2,377

# STEAM Comparative Headlines: 2023 and 2024 (Unindexed)

STEAM REPORT FOR 2013-2024 - FINAL

Comparing 2024 and 2023

COMPARATIVE HEADLINES

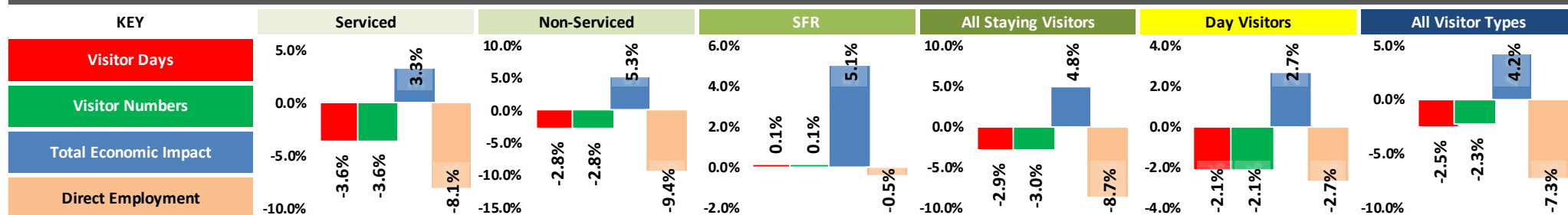
EXMOOR NATIONAL PARK

All £'s Historic Prices

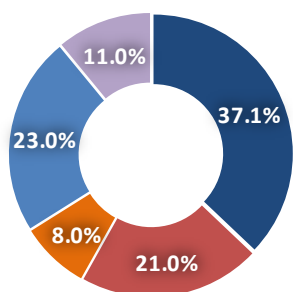
## KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %			
<b>Visitor Days</b> M	0.270	0.280	-3.6%	1.099	1.131	-2.8%	0.044	0.044	0.1%	1.413	1.455	-2.9%	1.277	1.305	-2.1%	2.690	2.760	-2.5%			
<b>Visitor Numbers</b> M	0.135	0.141	-3.6%	0.178	0.183	-2.8%	0.019	0.019	0.1%	0.332	0.342	-3.0%	1.277	1.305	-2.1%	1.609	1.647	-2.3%			
Direct Expenditure £M																176.91	169.84	4.2%			
Economic Impact £M	38.09	36.88	3.3%	134.77	128.01	5.3%	3.039	2.893	5.1%	175.90	167.78	4.8%	66.36	64.63	2.7%	242.26	232.41	4.2%			
Direct Employment FTEs	644	701	-8.1%	742	818	-9.4%	21	21	-0.5%	1,407	1,541	-8.7%	452	465	-2.7%	1,859	2,005	-7.3%			
Total Employment FTEs																2,377	2,529	-6.0%			

## PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - IN HISTORIC PRICES



### Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



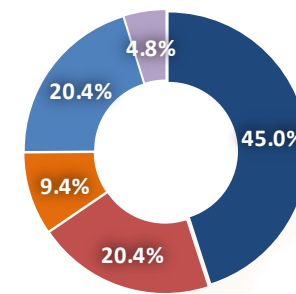
- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

	2024	2023	+/- %
Accommodation	65.61	60.95	7.6%
Food & Drink	37.19	36.41	2.1%
Recreation	14.09	13.80	2.2%
Shopping	40.63	39.70	2.3%
Transport	19.39	18.98	2.1%
<b>TOTAL DIRECT</b>	<b>176.91</b>	<b>169.84</b>	<b>4.2%</b>
Indirect	65.35	62.57	4.4%
<b>TOTAL</b>	<b>242.26</b>	<b>232.41</b>	<b>4.2%</b>

### Sectors

Sectors	2024	2023	+/- %
Accommodation	837	950	-11.9%
Food & Drink	380	393	-3.2%
Recreation	175	181	-3.2%
Shopping	379	390	-3.0%
Transport	89	91	-3.2%
<b>TOTAL DIRECT</b>	<b>1,859</b>	<b>2,005</b>	<b>-7.3%</b>
Indirect	518	523	-1.0%
<b>TOTAL</b>	<b>2,377</b>	<b>2,529</b>	<b>-6.0%</b>

### Sectoral Distribution of Employment - FTEs



- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

### Direct Employment Categories

# STEAM Comparative Pre-Covid Headlines: 2019 and 2024 (Indexed for inflation)

STEAM REPORT FOR 2013-2024 - FINAL

Comparing 2024 and 2019

COMPARATIVE HEADLINES

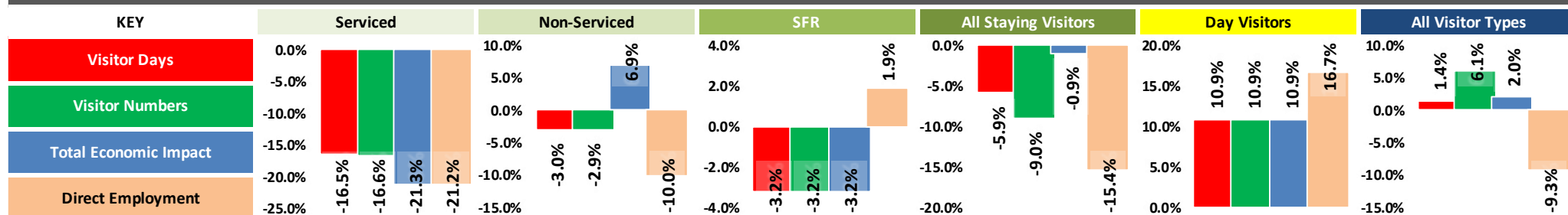
EXMOOR NATIONAL PARK

2019 in 2024 prices (1.336)

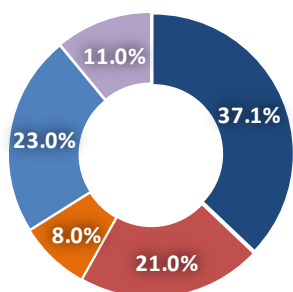
## KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2019 - INDEXED TO 2024

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %			
Visitor Days	M	0.270	0.323	-16.5%	1.099	1.133	-3.0%	0.044	0.046	-3.2%	1.413	1.502	-5.9%	1.277	1.152	10.9%	2.690	2.653	1.4%		
Visitor Numbers	M	0.135	0.162	-16.6%	0.178	0.183	-2.9%	0.019	0.019	-3.2%	0.332	0.365	-9.0%	1.277	1.152	10.9%	1.609	1.517	6.1%		
Direct Expenditure	£M																176.91	174.33	1.5%		
Economic Impact	£M	38.09	48.37	-21.3%	134.77	126.07	6.9%	3.039	3.140	-3.2%	175.90	177.58	-0.9%	66.36	59.83	10.9%	242.26	237.41	2.0%		
Direct Employment	FTEs	644	817	-21.2%	742	824	-10.0%	21	21	1.9%	1,407	1,662	-15.4%	452	387	16.7%	1,859	2,049	-9.3%		
Total Employment	FTEs																2,377	2,524	-5.8%		

## PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2019 - INDEXED TO 2024



### Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2024



- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

### Direct Expenditure Categories

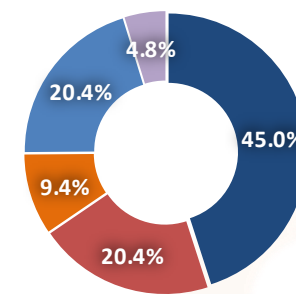
	2024	2019	+/- %
Accommodation	65.61	63.22	3.8%
Food & Drink	37.19	37.59	-1.1%
Recreation	14.09	14.16	-0.4%
Shopping	40.63	39.78	2.1%
Transport	19.39	19.59	-1.1%
<b>TOTAL DIRECT</b>	<b>176.91</b>	<b>174.33</b>	<b>1.5%</b>
Indirect	65.35	63.08	3.6%
<b>TOTAL</b>	<b>242.26</b>	<b>237.41</b>	<b>2.0%</b>

### Sectors

Accommodation	837	1,081	-22.5%
Food & Drink	380	365	4.1%
Recreation	175	167	4.8%
Shopping	379	352	7.5%
Transport	89	85	4.1%
<b>TOTAL DIRECT</b>	<b>1,859</b>	<b>2,049</b>	<b>-9.3%</b>
Indirect	518	475	9.0%
<b>TOTAL</b>	<b>2,377</b>	<b>2,524</b>	<b>-5.8%</b>

### Sectoral Distribution of Employment - FTEs

- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport



### Direct Employment Categories