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:

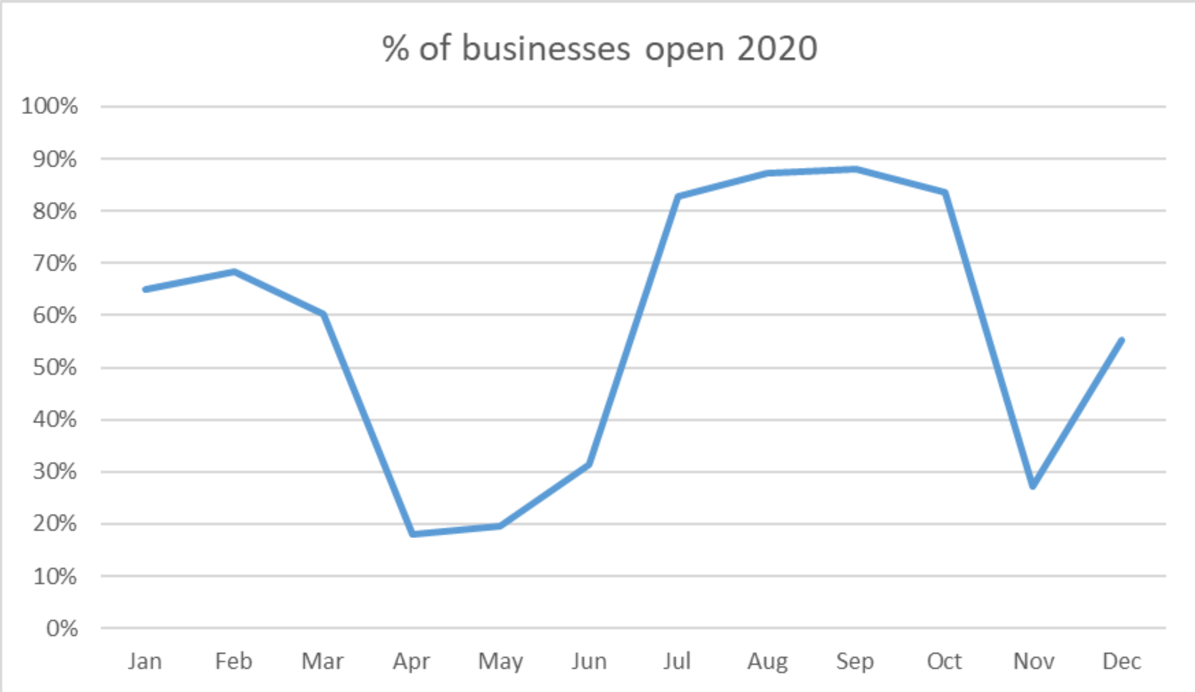
- Attractions *(Indoor attractions & Outdoor attractions)*
- Serviced accommodation
- Non-serviced accommodation *(Self catering, caravan & camping, hostel or group accommodation)*
- Retail
- Food & drink outlet
- Activity / experience provider

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

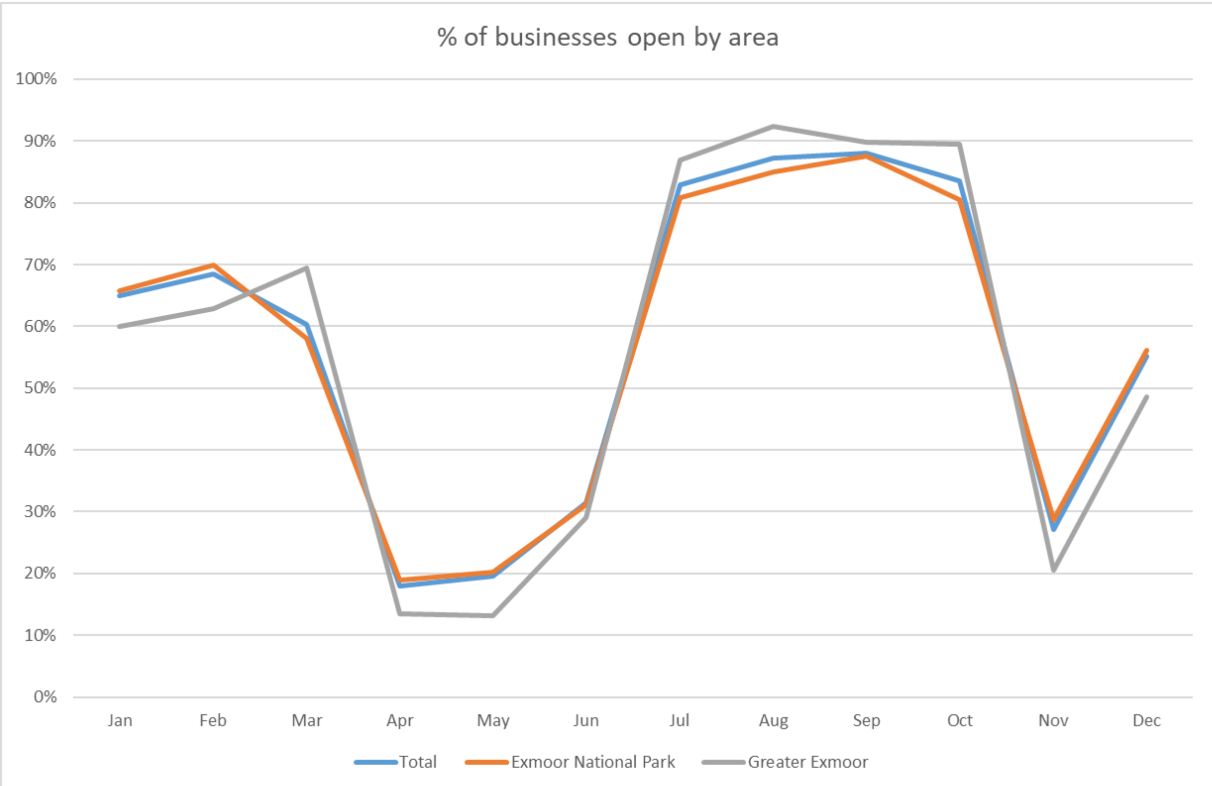
For each month respondents were asked if they were closed all month, or if they were open then at what percentage of their capacity they were operating.

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.

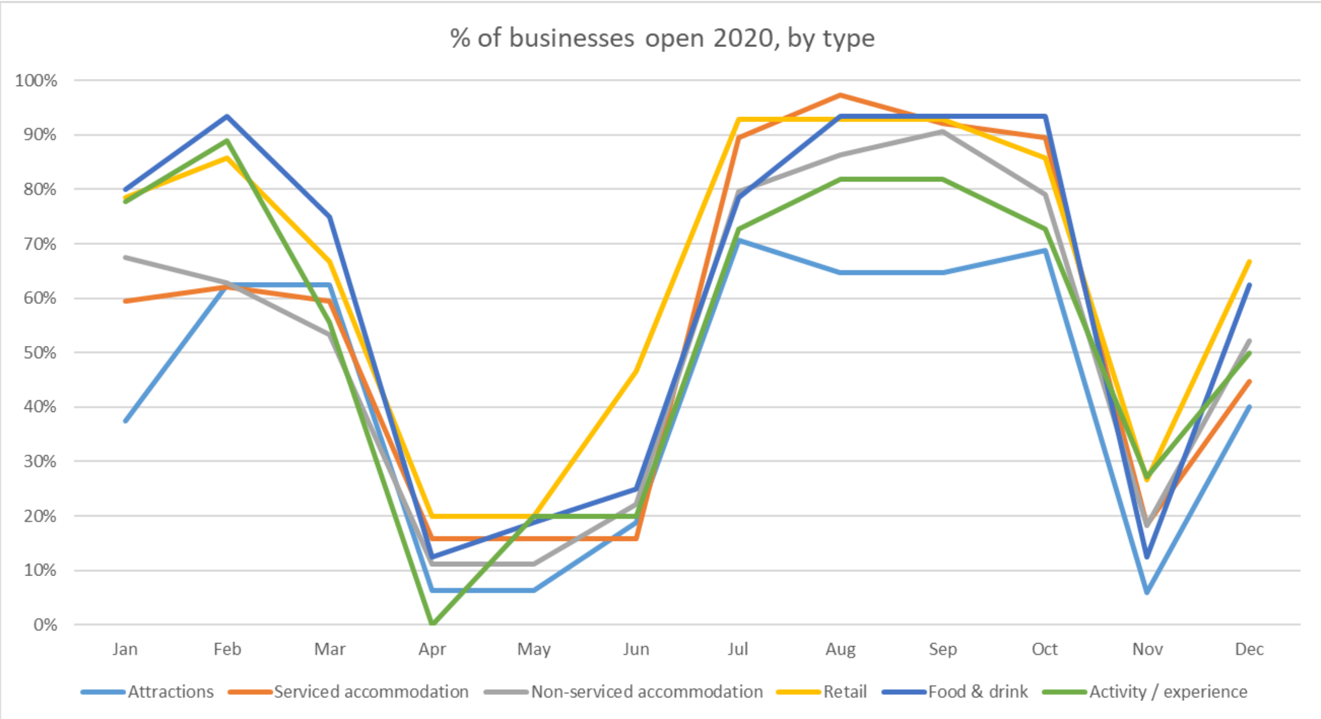


A very similar pattern of openings was seen across the National Park and Greater Exmoor areas. On average across the whole year for all responses 57% of businesses were open. For the National Park the average was also 57%, while for Greater Exmoor it was 56%.



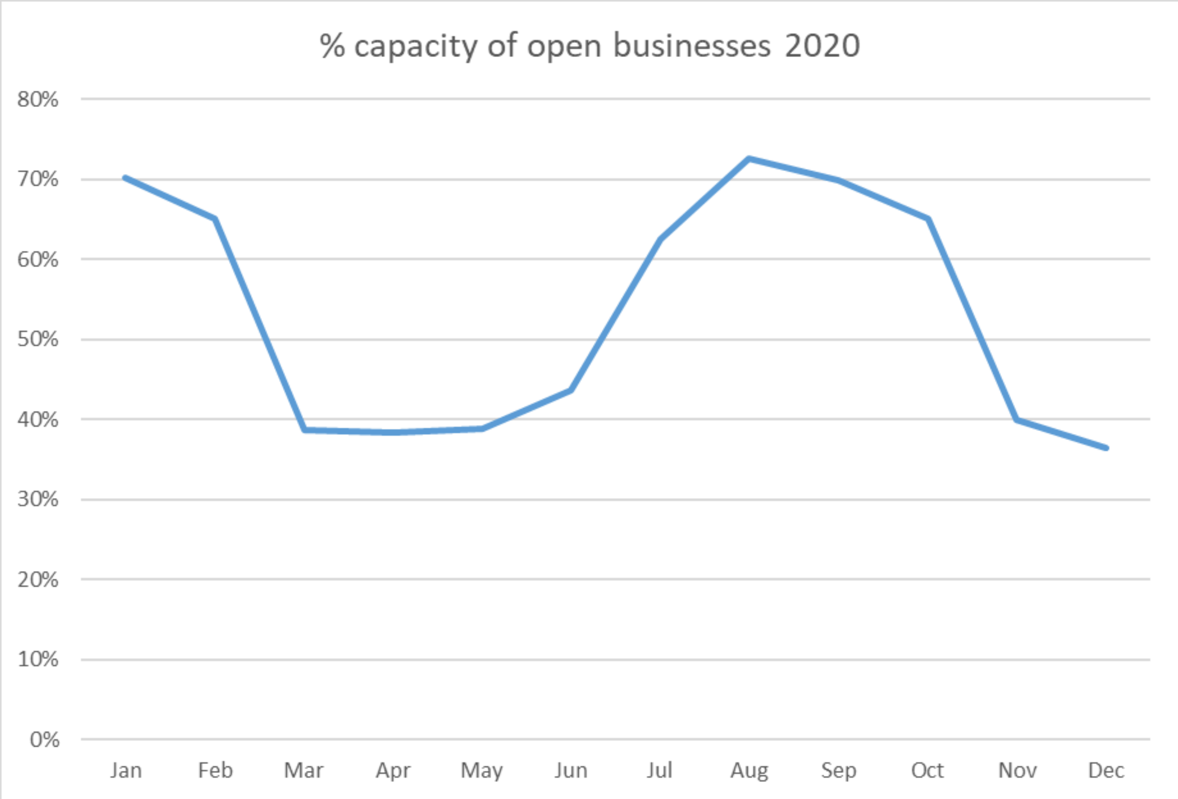
Business type had a stronger impact on the percentage of businesses open, mainly due to the different levels of restrictions applied to different sectors. The attraction sector was particularly badly affected, with only 6% of businesses open at all in April and May and only recovering to a maximum of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

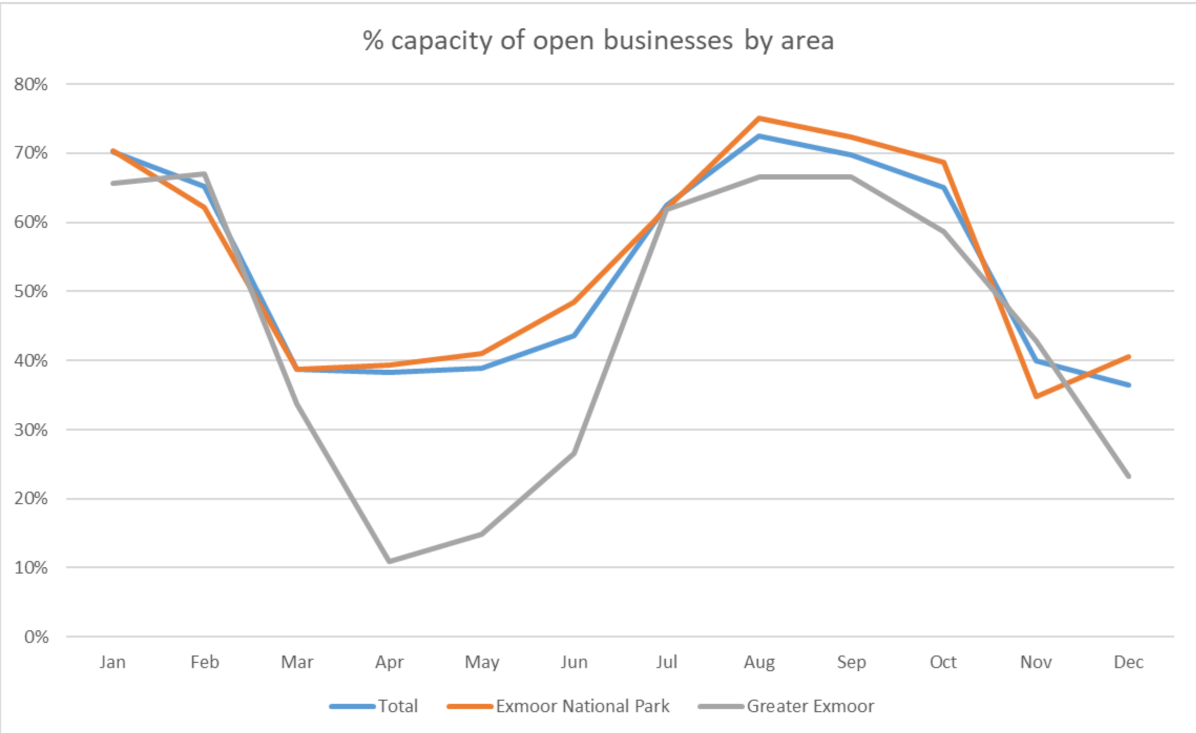


b) Capacity of open businesses

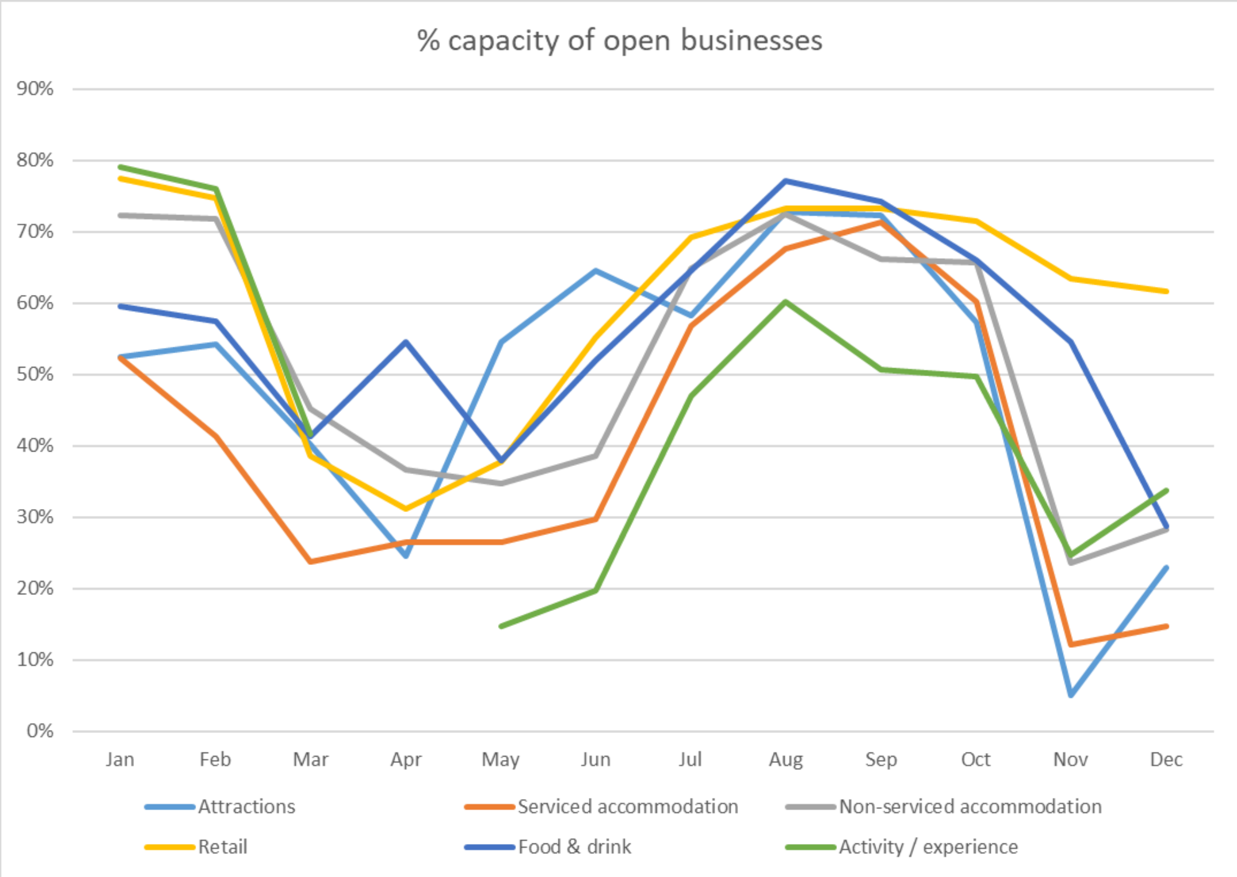
For the businesses which remained open, capacity fell to an average 38% of 2019 levels in April, rising to a high of 73% in August before tailing off again. On average through the year, businesses were operating at 53% of their 2019 capacity.



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.



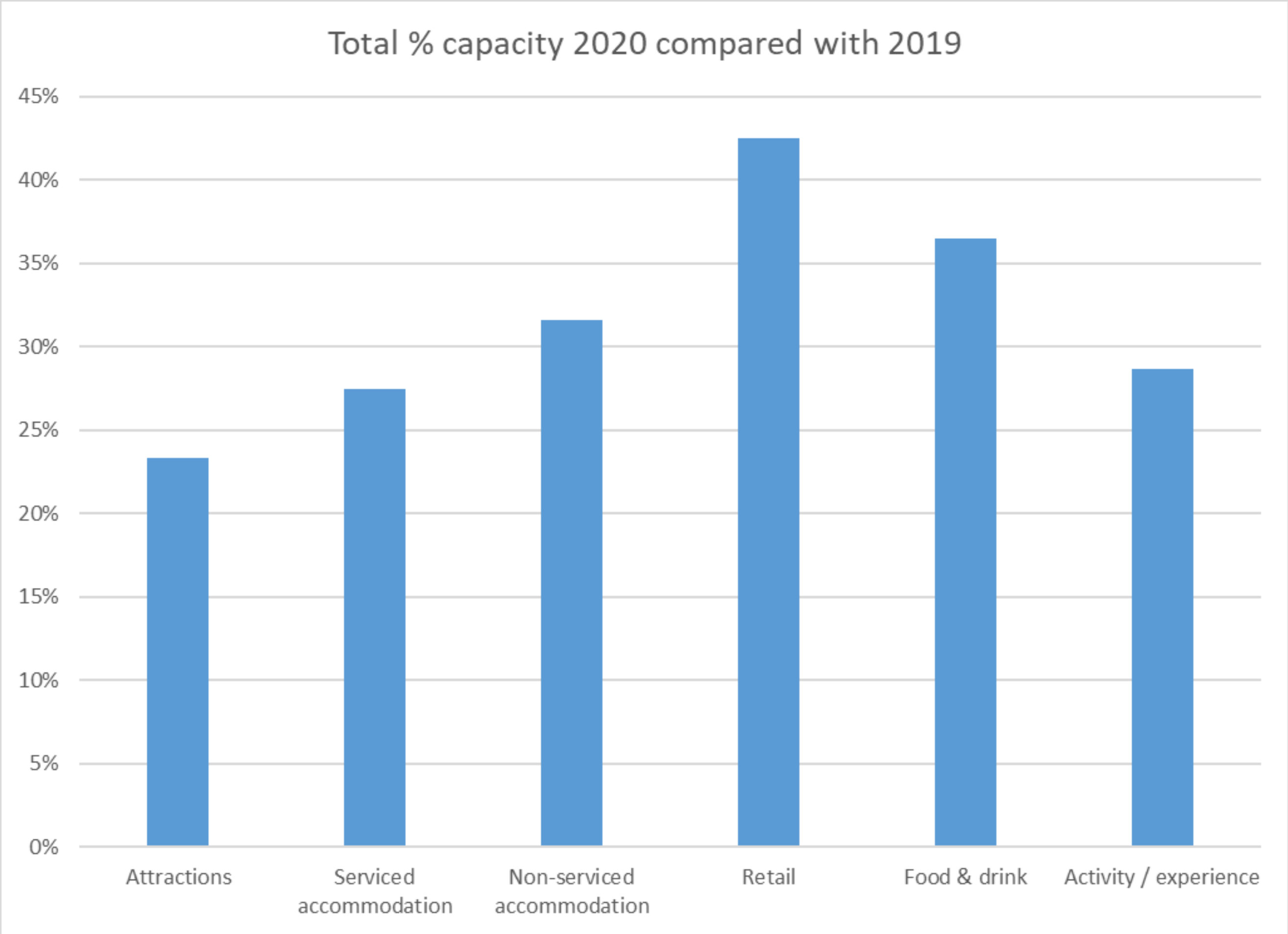
The food and drink outlets which were opened were able to reach a capacity of 77% in August. Activity and experience providers saw a maximum capacity of only 60%, in July.

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 combing 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.

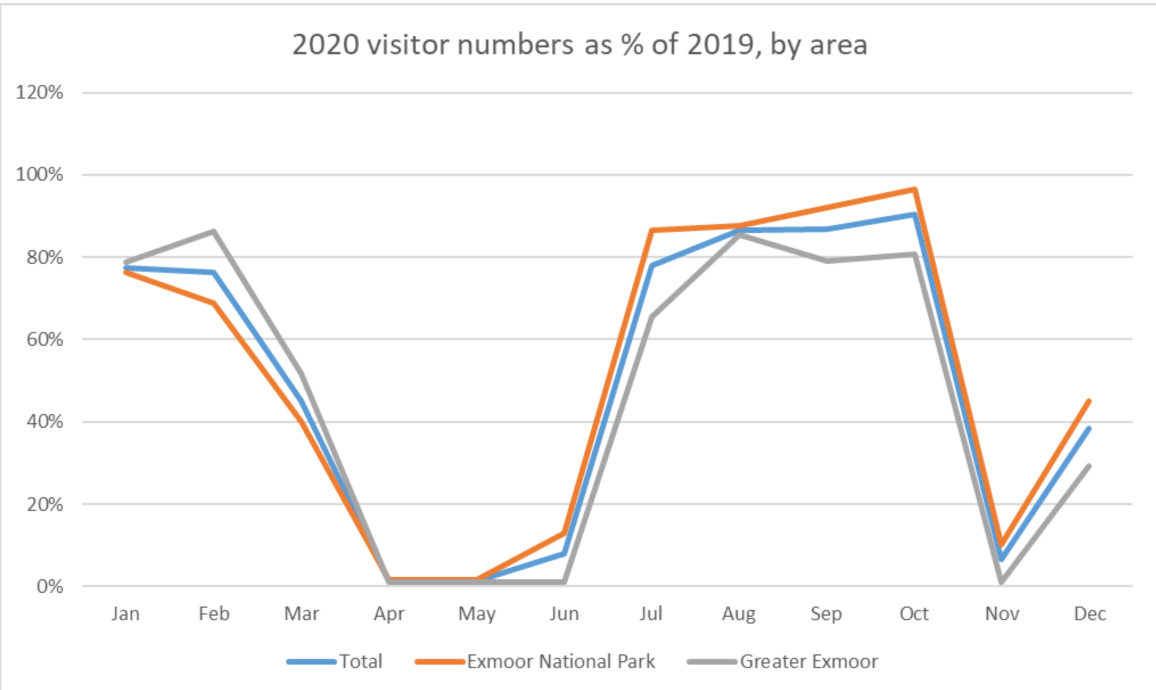
The sample size for monthly figures was too small to provide separate analysis by business type. Instead, the monthly figures were totalled to give annual figures which were added in to the annual analysis by business type.

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.

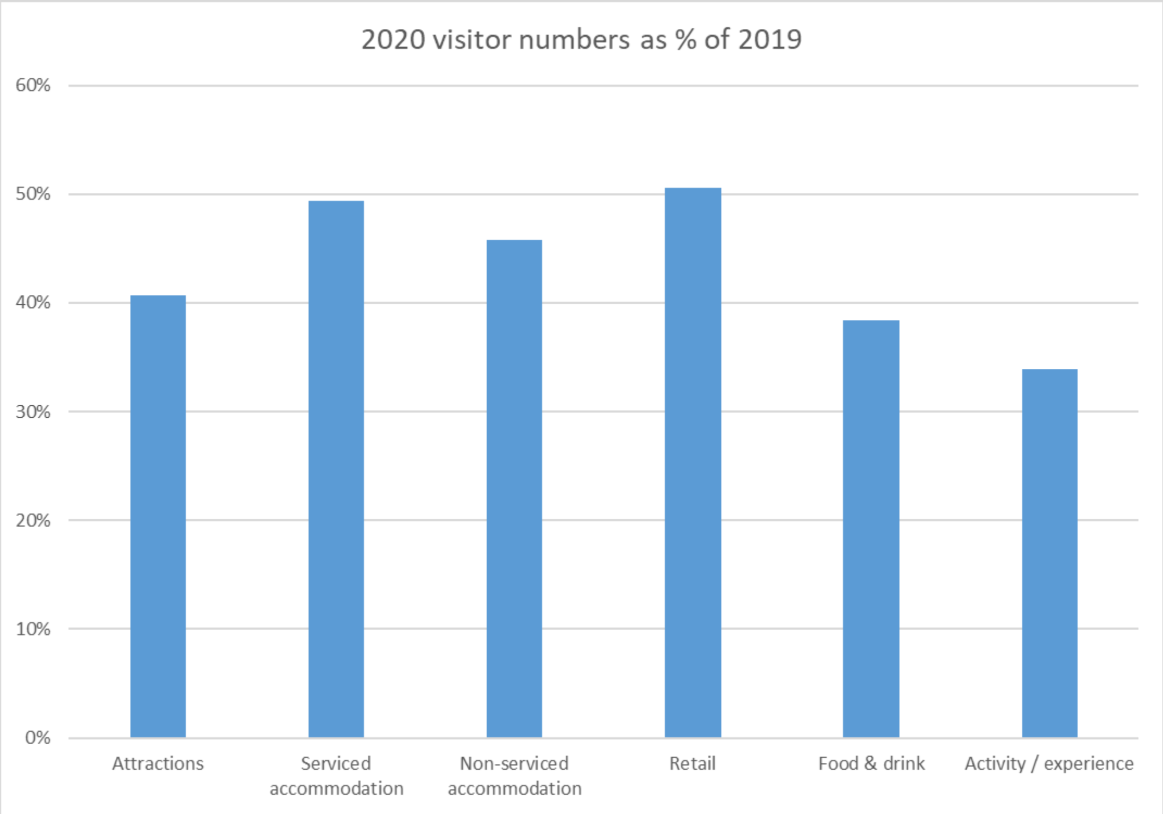
There was little difference in this pattern by area, although numbers in Greater Exmoor started off at a higher level, took a little longer to recover and only reached a high of 85% in August before falling again. In the National Park the numbers continued to grow to a maximum of 97% of the 2019 figure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

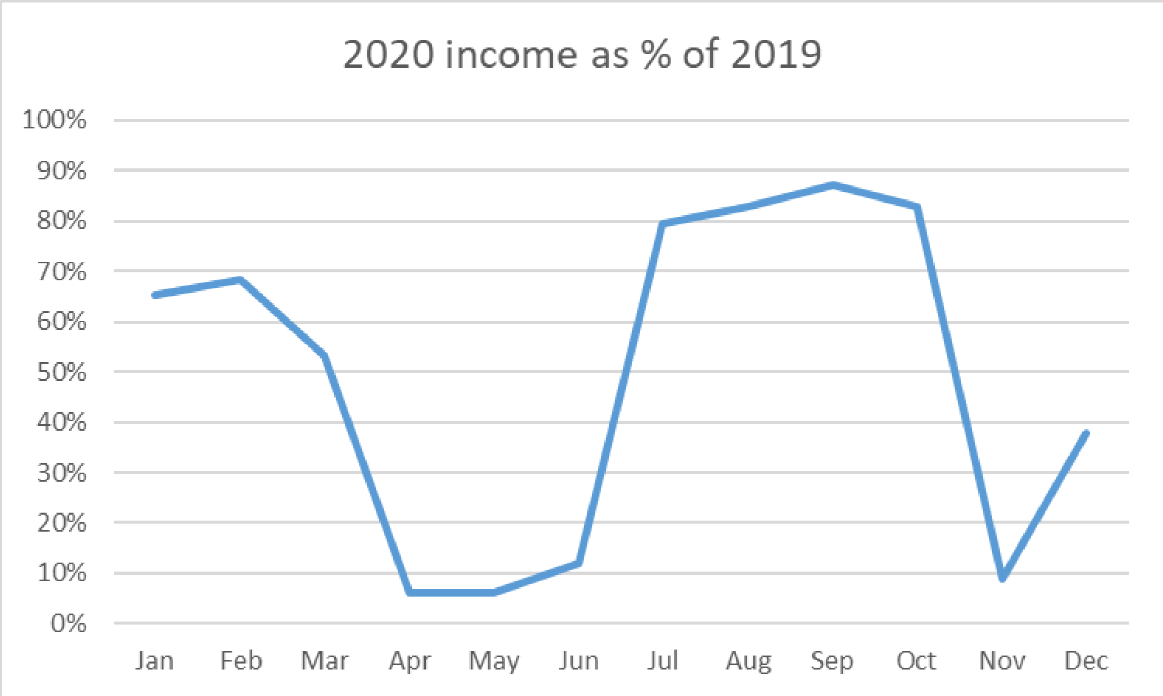


Q7 2020 visitor income

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.

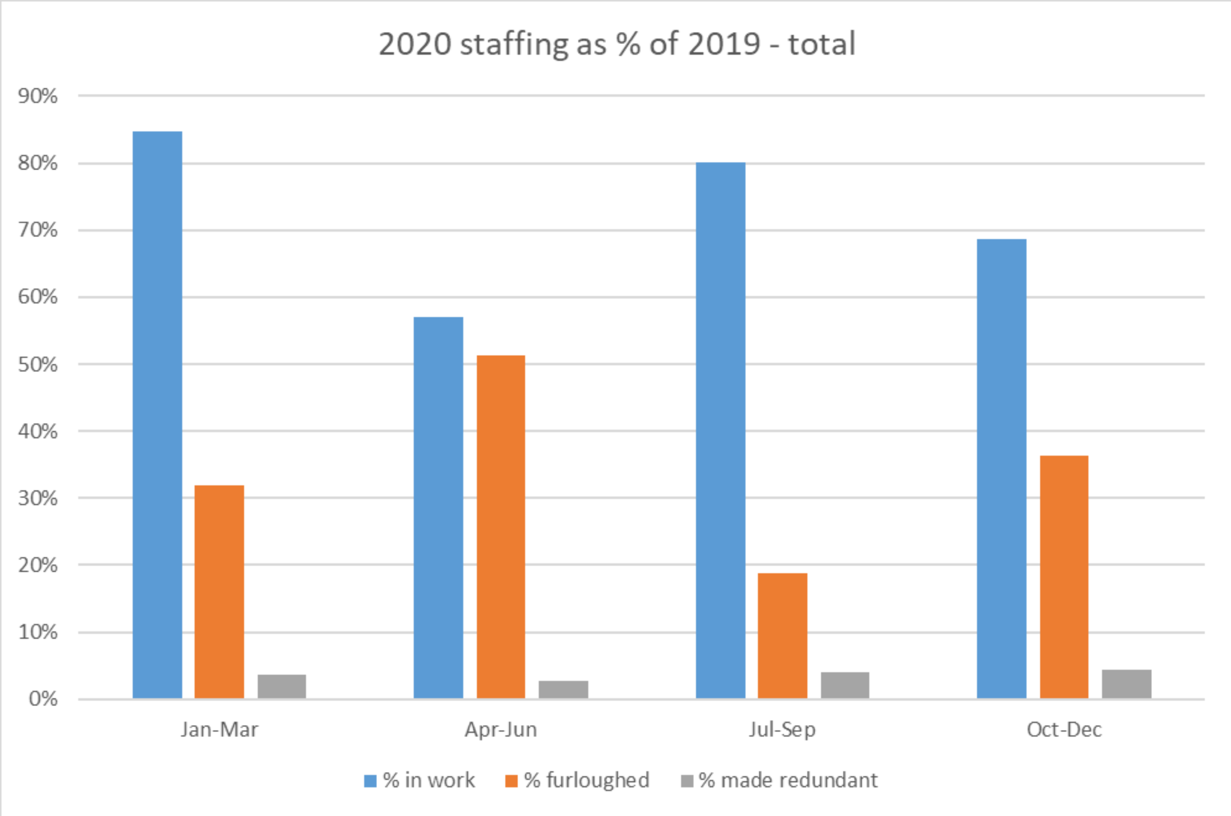
From the responses of a number of businesses there seems to have been some double-counting between the "in work" and "furloughed" categories, probably reflecting the fact that staff were in work for part of the quarter but furloughed for the remainder. This means that sometimes the quarter totals add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

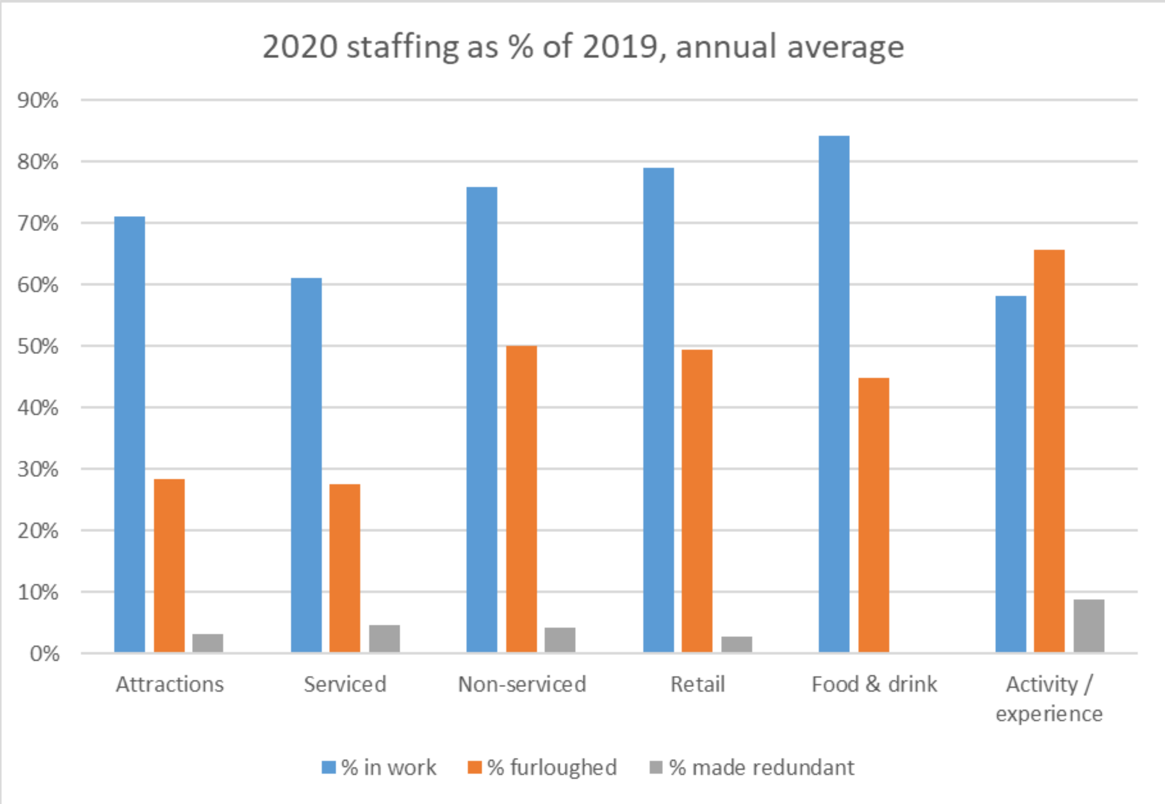
Looking at the annual averages for employment figures there was little difference between the National Park and Greater Exmoor, although businesses in the National Park seem to have made more extensive use of the furlough scheme.

	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?

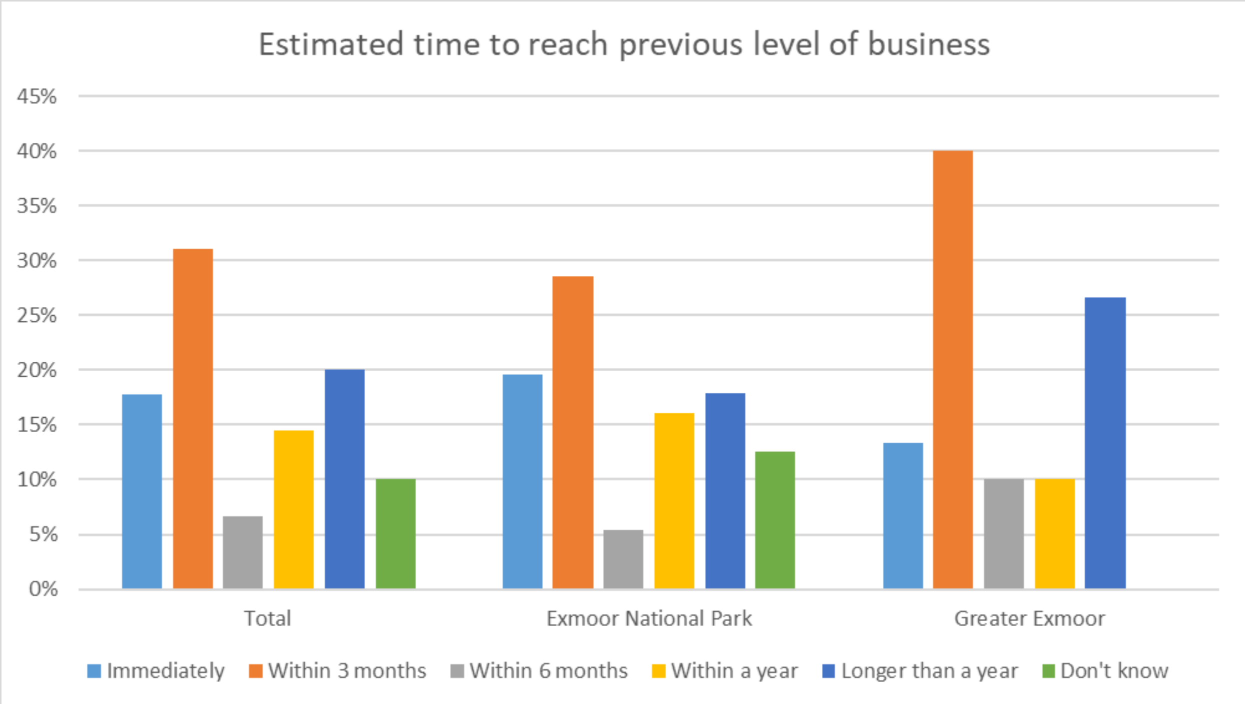
Q16 Do you have any general comments you'd like to make about the impact of COVID-19?

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%