

Exmoor Virtual Visitor Survey 2020

(Covid-19 impact)

Key findings

- **Over 95% of respondents are likely or very likely to visit Exmoor within the next 18 months.** 90% had visited within the last 3 years. This demonstrates the strength of brand loyalty visitors to Exmoor have, which can be used positively in relation to tourism recovery work.
- **Over 70% of respondents are considering an overnight UK break in the next 12 months.** But a fifth are unsure yet as to when they may seek to consider an overnight UK stay and so it will be important to maintain and raise the profile of Exmoor as a destination brand.
- **A quarter are more likely to bring increased supplies from home.** Whilst there have been concerns within communities around access to goods this may adversely affect sales in local shops.
- **Eat-in food and drink establishments are facing a potential reduction in demand of over a fifth.** The Governments' 'eat out to help out' may help address this over August, but many providers will have reduced capacity anyhow to adhere to social distancing guidelines.
- **Almost 80% say it will be important for them to look for venues which are not too busy.** This could lead to issues meeting expectations, with demand potentially outstripping supply.
- **Over half of respondents can't wait to return, and nearly half are relaxed about visiting Exmoor, considering it safer than many other areas.** Tourism Partners have collectively been sharing the 'Visit Exmoor. Safely.' message and individual business can continue to get behind this, in addition to demonstrating their own Covid-secure measures.
- **Compared to previous surveys, a higher proportion of respondents have shown an interest in wildlife watching and stargazing.** This interest provides a strong 'hook' to attract visitors into the autumn and winter.
- **The opportunity for peace and quiet / tranquillity is the second highest 'attractor' to the area (following the landscape / scenery).** As the tourism sector looks to promote opportunities later into the year this provides a strong hook for marketing messages.
- **60% of visitors would be interested in new services from accommodation providers such as provision of picnic hampers and a quarter are likely to purchase increased takeaways.** This demonstrates the opportunity for businesses to adapt and diversify where appropriate.
- **Tailored advice from people whether through National Park / Visitor Centres, hosts or friends and family has an important role to play alongside online information.** It is important that we develop and promote Covid-safe activities and increase awareness locally.

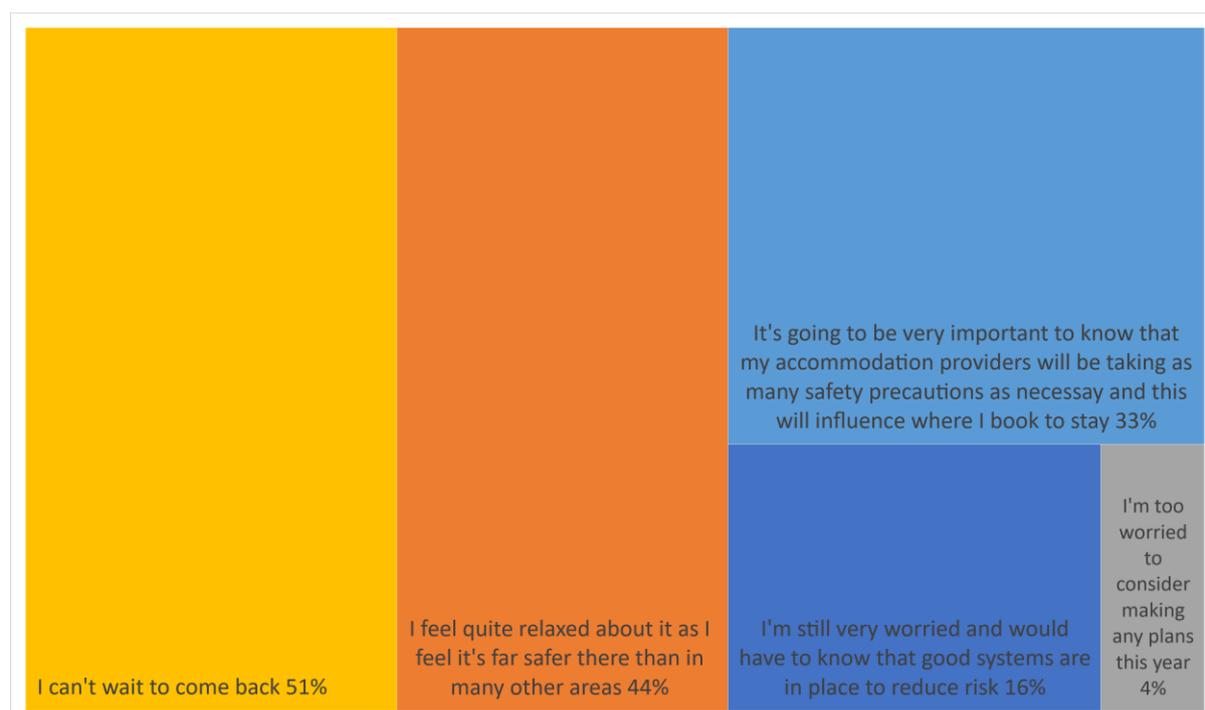
This report provides results from an online visitor survey published by Exmoor National Park Authority to ascertain views from previous and potential new visitors to Exmoor in the light of Covid-19 impacts.

The survey was published on 16 June and ran for a month to the 15 July 2020. During this period the Prime Minister announced on the 23 June plans to lift the restrictions on overnight stays from 4 July 2020. To aid business recovery plans interim results, based on the first 319 responses received by 8am on the 22 June, were published whilst the survey continued. The result below includes all responses received during the survey period.

The survey was promoted via social media channels (including those of partner organisations) and local tourism businesses were invited to circulate the link to their previous guests and marketing leads too.

With 540 responses in total the sample size gives us a margin of error of less than 5% at a 95% level confidence rate.

I. Which statement(s) best describe your frame of mind about booking a holiday on Exmoor?

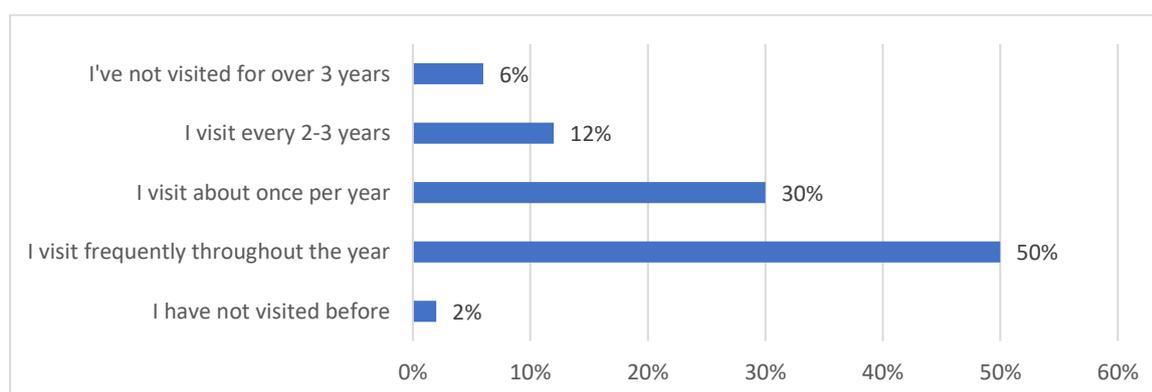


Just over half of respondents reported that they were keen to rediscover Exmoor and only 4% were too worried to consider making any plans this year as a result of Covid-19.

44% perceive Exmoor as being safer than many other areas of the UK.

Over a third state that it will be very important to know that accommodation providers are taking the necessary safety precautions, whilst 16% would have to know that good systems are in place to reduce risk. This suggests businesses should be looking to adopt one of the national schemes such as Visit England's 'Good to Go' scheme or the AA's 'Covid Confidence' scheme (both of which are free).

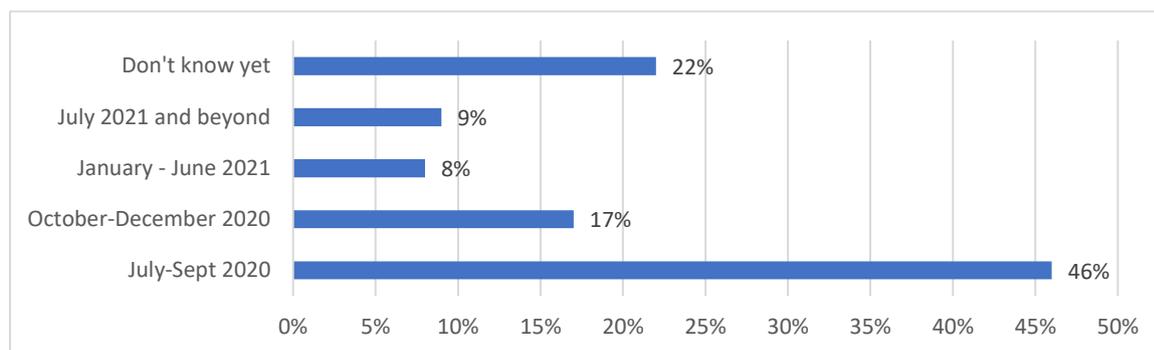
2. How often have you visited Exmoor before (pre Covid-19)?



Traditionally Exmoor fares well for repeat visits. This virtual survey had fewer respondents that had not visited in the last 3 years when compared to the results of the 2018 Visitor Survey. This is likely to be a result of the digital channels used to engage with visitors with the survey during the lockdown period, with more frequent visitors more likely to be engaged in Exmoor-related social media channels or on contact databases of local businesses.

This loyal base of visitors will help with Exmoor's tourism recovery. There has also been anecdotal evidence that Exmoor is currently receiving a higher proportion of first time visitors – this is likely to be as a result of both visitors from relatively nearby exploring Exmoor in lieu of other activities (especially whilst overnight stays were prohibited and many other leisure facilities closed), as well as those seeking the open spaces offered by Exmoor.

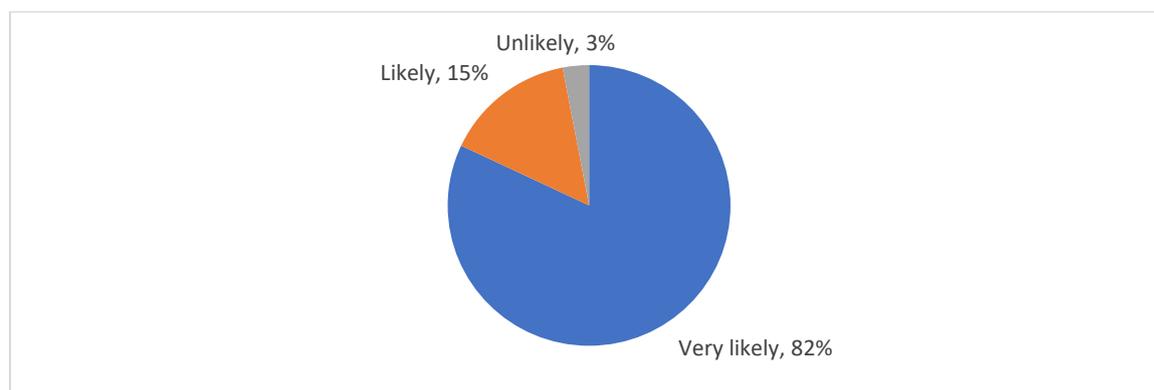
3. When are you considering a UK holiday with overnight accommodation?



Just under half of respondents were planning a UK holiday between July and September- we are unable to directly compare this to 'business as usual', but it is likely this represents a significant drop on the usual intentions of taking a break over the peak season (albeit a significant proportion would often be looking at overseas trips). A fifth were unsure of plans at the time of being surveyed – as recovery gets underway this is a particular audience that might be attracted to visiting Exmoor.

The Exmoor Covid-19 Tourism Response and Recovery Plan has identified an opportunity to extend the season in to the late autumn and early winter in order to claw back lost trade from the earlier part of the year. This also provides an opportunity to engage a wider audience in some of the special qualities of Exmoor such as its dark skies and other seasonal aspects. At the time of the survey just under a fifth of respondents were considering a holiday between October and December.

4. How likely are you to visit Exmoor in the next 18 months?



97% state that they are likely to visit Exmoor in the next 18 months, with 82% saying they are very likely. Of the 3% saying they would be unlikely to visit in that timeframe a range of reasons were given which can be broadly grouped together as those who already had other plans to visit other regions, those who due to age and health (non-Covid related) were unlikely to holiday this year and those who had concerns around Covid and were, for example, awaiting a vaccine before commencing any overnight travel.

A number of comments were received in relation to this question which underline the loyalty of visitors to Exmoor and their enthusiasm for the area:

It's the most breath taking place with the view and walks and the people you meet along the way are so friendly and nice it's a beautiful place to come to and spend time.

I love Exmoor, it is one of my favourite places in the world, especially the wild bits.

Can't wait to visit just waiting for you to say it's ok

The most amazing place, watching weekly u tube videos to fill the gap until we can get back

Exmoor is my most favourite place to be and miss it so much

Exmoor is our getaway from the hustle and bustle of life and be that for day trips or camping we just love it there any time of year.

Come at least once a year and have done for 15 years with my kids, now grown- ups and still come with me. We meet up with friends each year that we've met in Exmoor and we love it! It's the place that is like a refresh button and revived me for the rest of the year.

A few comments picked up on the fears that some members of the community had shown to the reopening of tourism, especially on social media, given concerns around the potential transmission of Covid-19:

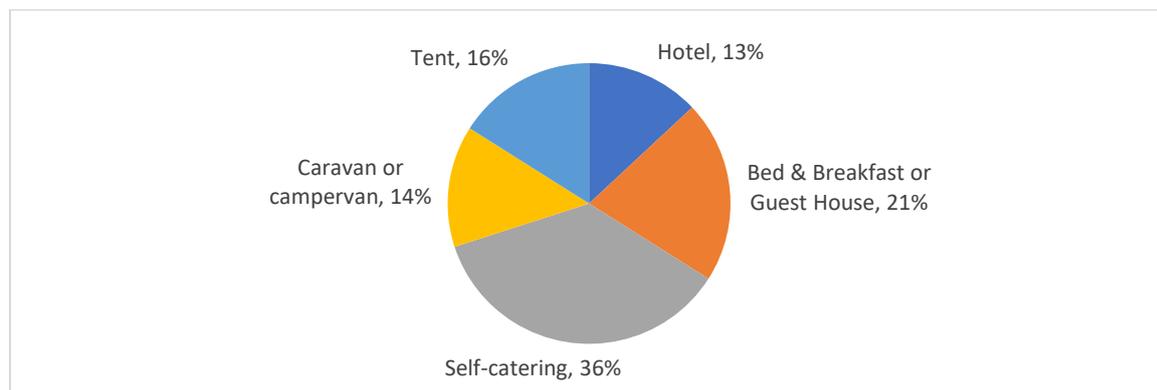
Absolutely love Exmoor and the surrounding areas. And hope we will be welcomed when we can return safely

There should have been a more generic/politer response along the lines of: please come later in the year! The natural beauty, wildlife and activities will be here waiting for you.

Social media indications are that visitors are not welcome. Threats against visitors.

These example comments demonstrate the need to work together to ensure that those responsible for promoting the area provide positive message to 'Visit Exmoor. Safely'; Respecting host communities, protecting the natural environment and enjoying the offer Exmoor offers as a national asset.

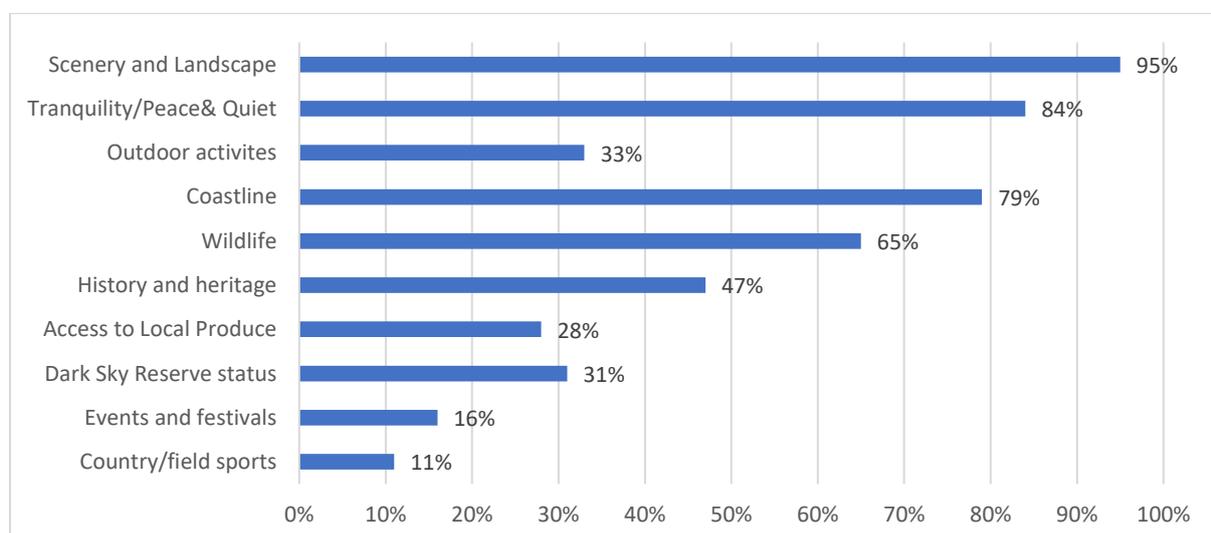
5. What type of accommodation would you prefer to stay in for your next holiday?



When compared to the results of the 2018 Visitor Survey there has not been a significant shift in accommodation preferences. The virtual survey did not specifically ask about staying with friends and relatives which accounted for 8% in the 2018 survey. If we assume that this is accounted for within serviced accommodation future intentions will follow past patterns closely:

	2018 Visitor Survey	2020 Covid-19 Virtual Visitor survey intentions
Camping / Caravan / Campervan	28%	30%
Self-Catering	35%	36%
Serviced (inc hotels, B&Bs etc and staying with friends & relatives (2018))	37%	34%

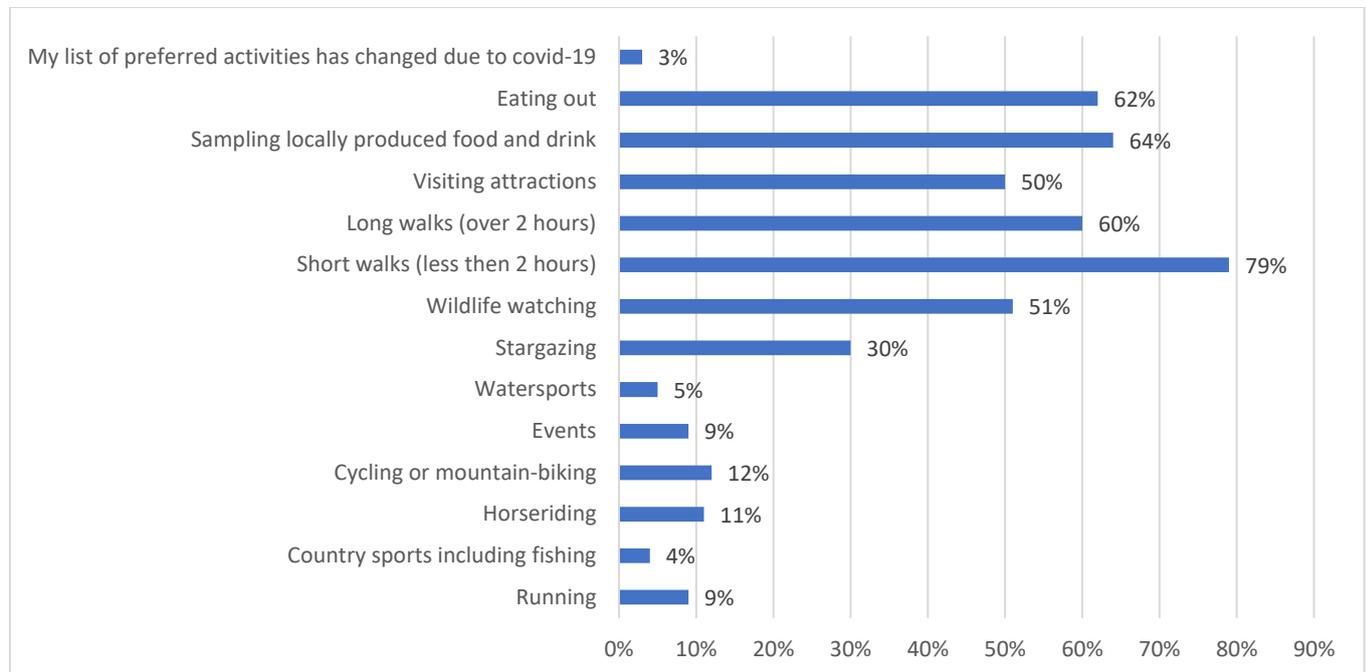
6. Which of the following attract you to visit Exmoor?



Scenery / landscape continues to be the primary attractor to Exmoor followed by tranquillity / peace & quiet. Potentially related to Covid and the desire for people to seek open spaces the levels stating

tranquillity as an attractor has risen from 71% in the 2018 Visitor Survey to 84% here. Other notable differences from the 2018 Visitor Survey include opportunities for outdoor activities (down from 53%), wildlife (up from 45%) and the area's status as an International Dark Sky Reserve (up from 9%). Once again, these last two feed in well to aspirations for a push to further extend the season into the autumn.

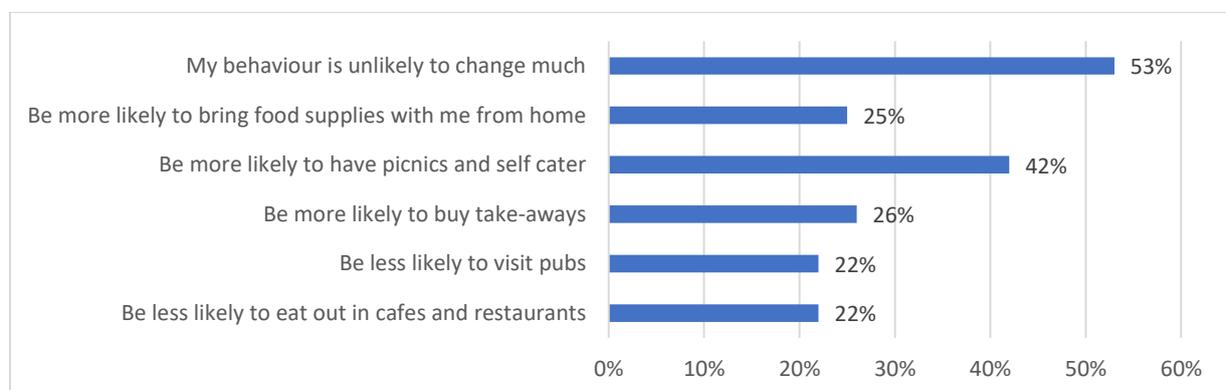
7. Which of the following activities will you do on your next visit to Exmoor?



The numbers reporting on their intentions to undertake both short and long walks have grown when compared to the 2018 visitor survey (from 71 to 79% for short walks, and from 34% to 60% for long walks over 2 hours). Other notable differences include an increase in those intending to go wildlife watching (up from 30%) and stargazing (up from 7%). These are all activities that can be undertaken relatively safely from the risk of Covid-19 given they all take place outdoors.

It should be noted that there is likely to be a difference between stated intentions of activities undertaken vs those actually undertaken on a trip which may account for some of the differences.

8. Assuming social distancing can be safely maintained how would your visitor behaviour change?



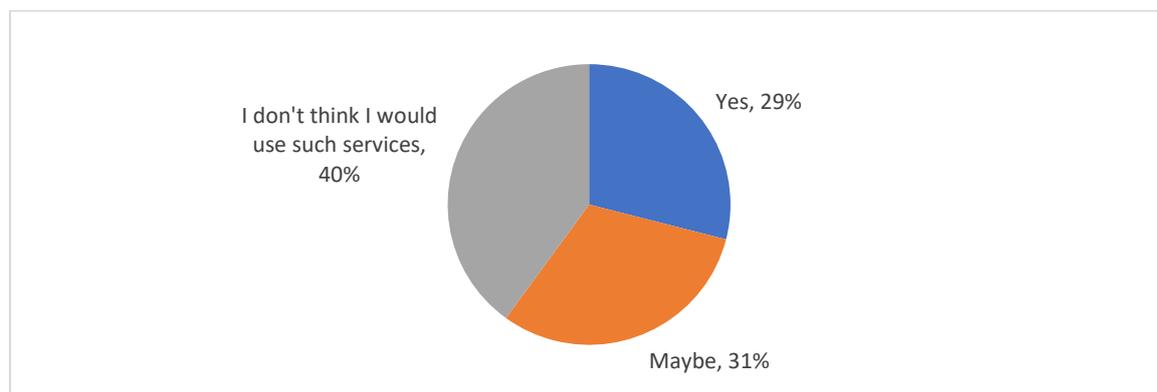
Over half of respondents are not expecting a significant change in their visitor habits.

However, 25% state they are more likely to bring food supplies from home. Whilst this may help allay fears within local communities regarding availability of food, it will also potentially undermine the viability of local shops and producers which often depend on visitor trade to remain viable year round.

Over 40% are more likely to have picnics and self-cater – this will have a negative impact on trade for cafés, pubs and restaurants. As highlighted above in Q7 there is a slight contradiction here with over a fifth of visitors reporting that they would be less likely to visit pubs or eat out in cafes/restaurants, whilst those stating eating-out as an activity undertaken on Exmoor has risen. This might be an issue of frequency (e.g. a higher proportion of people eating out, but less frequently than they would usually). The recently launched Eat Out to Help Out scheme by the Government offering £10 towards meals out Mondays – Wednesdays in August may help bolster the food and drinks service providers.

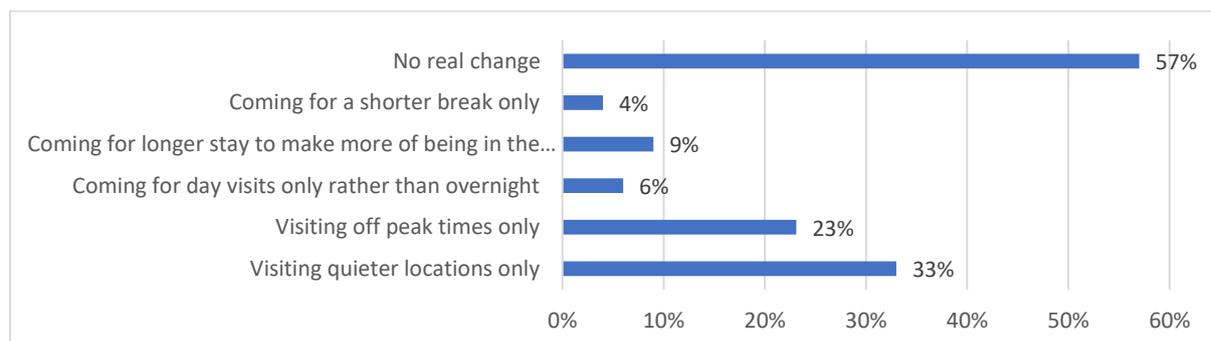
There is clearly a diversification opportunity around takeaways and to date many places that offered takeaways during the lockdown are continuing to offer such a service – this is likely to appeal to visitors as well as local residents.

9. Would you be interested in your accommodation hosts/providers offering additional food such as pre-prepared picnics or food hampers?



There is a clear opportunity for some businesses to benefit by providing a broader range of products and services to guests as they adapt to a slightly different experience whilst visiting Exmoor. This also offers an opportunity to enhance the experience of visitors through provision of local products and making the stories of these products available as part of any packages.

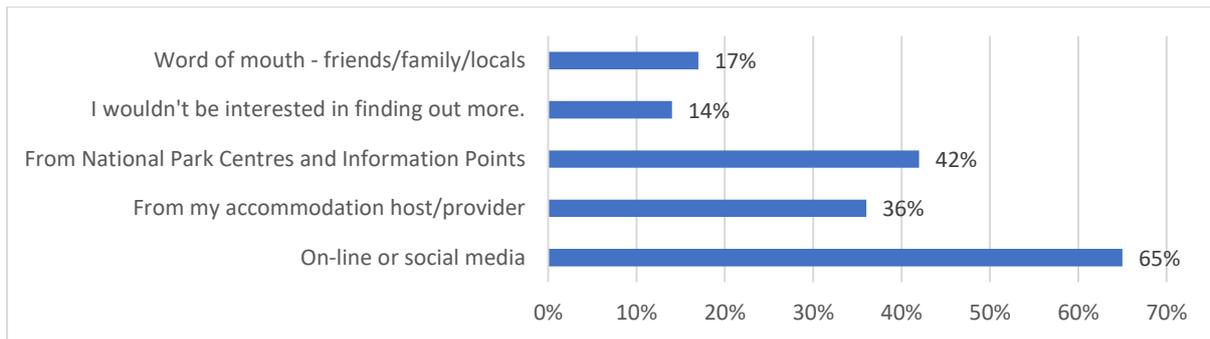
10. How might your next trip to Exmoor be different due to Covid-19?



Just under two thirds are not envisaging any changes to their future visits – this correlates with the responses to Q8 where over 50% state they don't envisage changing their visitor behaviour.

With a third of potential visitors seeking quieter locations and over a fifth opting to visit outside of peak season there is an opportunity to spread the 'load' of tourism in terms of time and place.

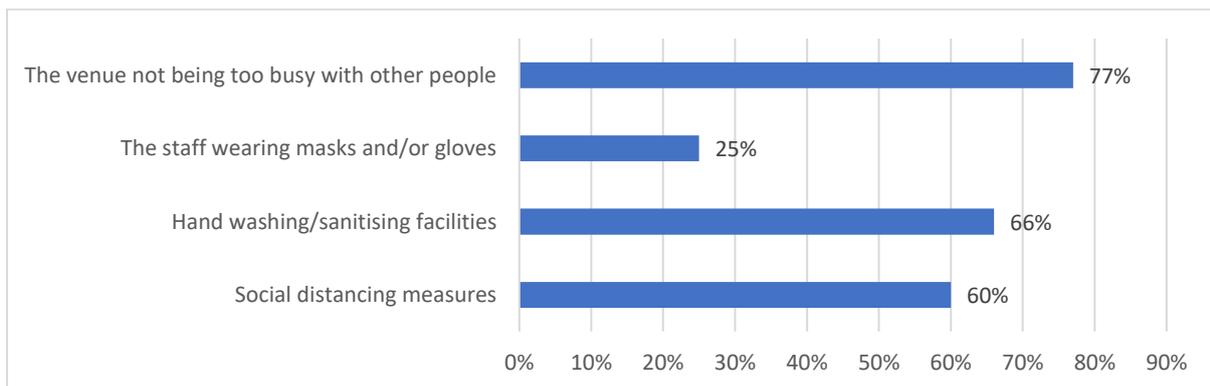
11. Would you like to find out more about activities with safe social-distancing and if so, where would you hope to find it?



As might be expected online information will play the largest role as a way of disseminating visitor information in the light of Covid-19, utilised by two thirds of respondents.

However, the personal advice available from National Park Cents and Visitor Centres as well as from host businesses has an important role to play too.

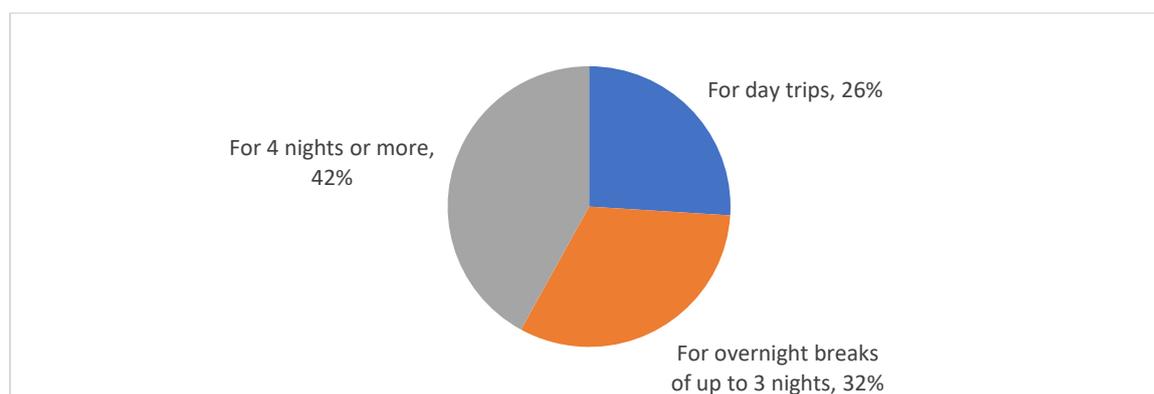
12. Which of the following would be very important to you when choosing which accommodation, attraction or food venue to use?



Over three quarters of potential visitors say it will be important that a venue is not too busy with other people. As per government guidelines businesses are adapting to operate in a Covid Secure way which is reducing their capacity. Many respondents however are reporting that they wouldn't change their visit behaviours significantly. As such it is possible that demand will outstrip supply over the peak season this year.

Managing supply and demand will be a delicate balance over the coming months as businesses seek to offer the best experience they can, meet social distancing criteria, maintain viability and cater for a potential increase in demand (brought about by decreased supply both in the UK and overseas).

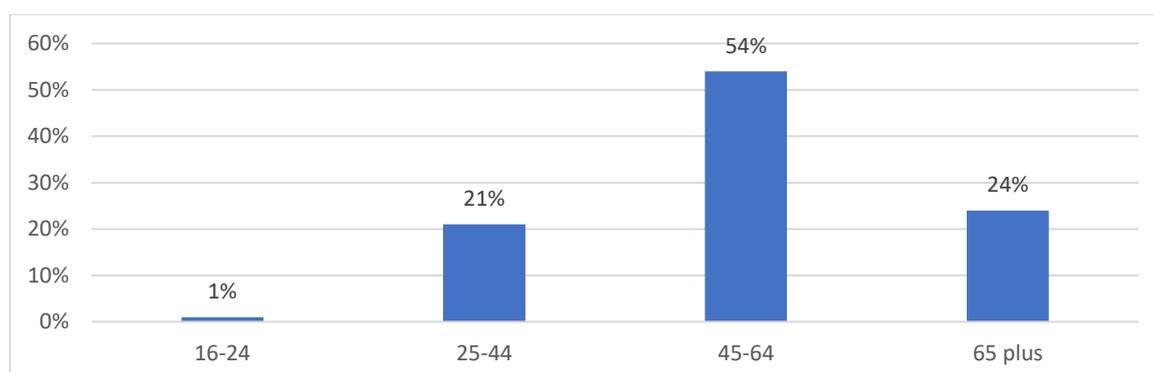
13. Pre Covid-19 would you generally have visited Exmoor for day trips, for overnight stays up to 3 nights or 4 nights or more?



The proportion of respondents that would usually visit Exmoor for a day is approximately half the proportion of day visitors traditionally captured in our usual face-to-face visitor surveys which usually show that about half of all visitors are on a day trip either from home or elsewhere in the region. This may be owing to the self-selecting nature of this virtual survey with those living nearby, and potentially visiting for leisure purposes, not associating themselves as ‘visitors’ for example.

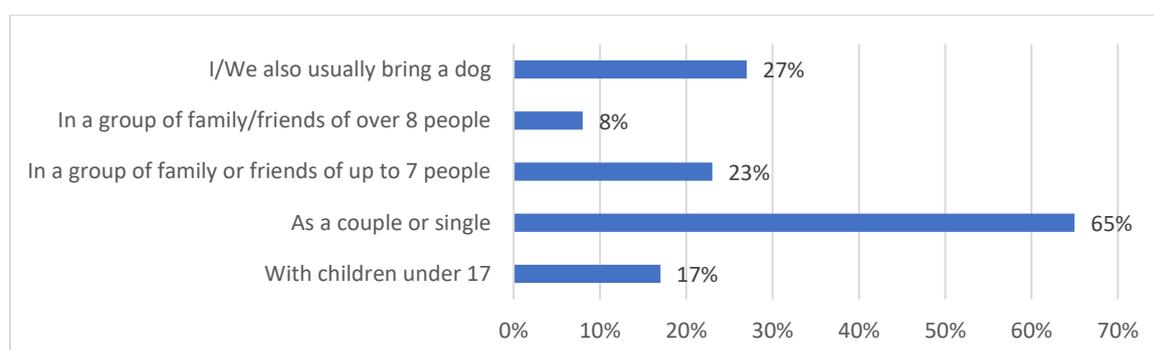
It is therefore worth bearing this in mind when considering the results. Wider tourism research has suggested that day trips may increase, at least in the initial period following lock down with consumers requiring increased confidence to stay away from home.

14. Age range of respondents



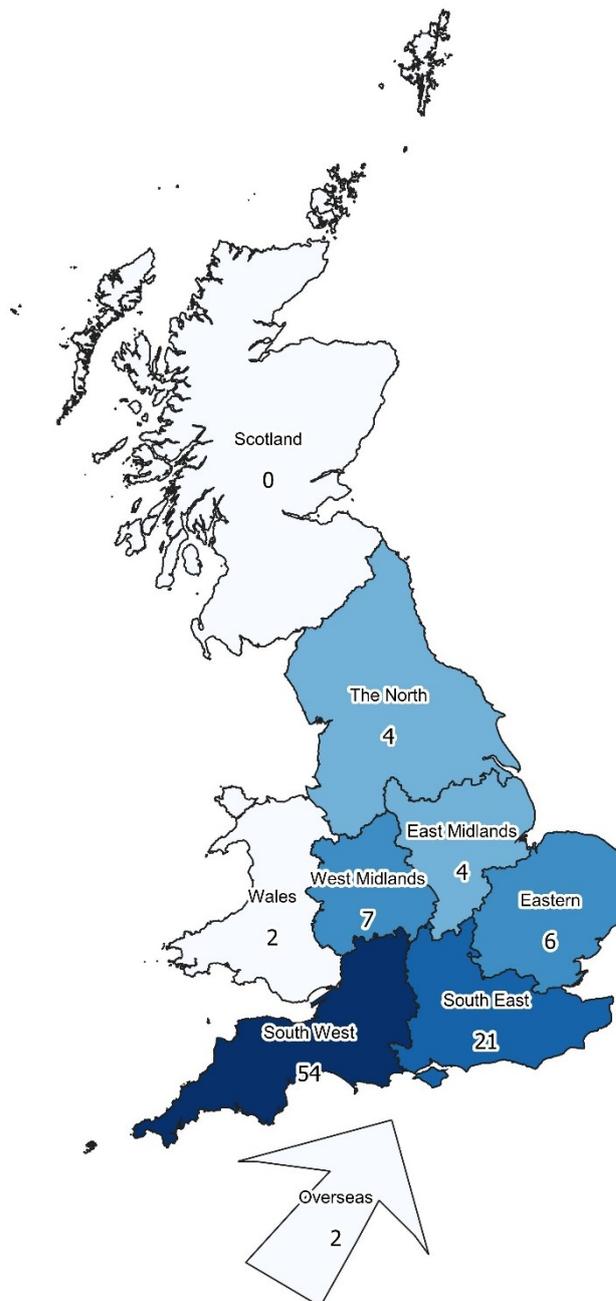
Wider tourism research suggests the immediate post lock-down period may attract a wider range of ages visiting destinations such as Exmoor.

15. Who do respondents usually holiday with?



These figures are broadly in line with the group composition previously measured on Exmoor through the 2018 Visitor Survey.

16. Location of respondents – percentage of respondents from UK regions and overseas.



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