

Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and
Business Improvement Area

April 2021

Prepared by:



On behalf of:



Introduction and Methodology and approach

This report evaluates the immediate and ongoing impacts of Covid- 19 to Tourism Business in Greater Yarmouth, as well as assessing the long-term economic impact.

Methodology

The results are based on a monthly online survey to businesses in the Greater Yarmouth area. It uses a structured questionnaire, adapting some questions and adding / removing other questions as the situation evolves. We are using a 'Have your say' online platform style survey, based on personalised email invitations to fill in a short online questionnaire. The survey allows to closely monitor the immediate impact of COVID - 19 on an ongoing basis. The survey is fully managed in-house by Destination Research using Typeform software package, which offers full online and mobile functionalities. The results of the survey are being used and distributed by GYT BIA.

Outputs

The monthly report reflects on the very latest industry sentiment. This and subsequent reports will include a summary of immediate reactions, longer term recovery plan actions as well as general business performance. This edition is based on a sample of 65 responses. This and subsequent reports will include a breakdown of responses for the current and past months as well as an average of all responses for the year to date.

Outcomes

Ultimately, the research should allow Greater Yarmouth Tourism and Business Improvement Area (GYTBIA) to:

- Provide a forum for consistent and comprehensive analysis of the implications of the Coronavirus (COVID-19) pandemic on the local tourism industry.
- Act as the one-stop-shop communications channel for the local tourism industry in relation to Coronavirus (COVID-19).



Key developments:

Latest updates for businesses affected by COVID-19

The Government updated the guidance on (COVID-19) Coronavirus restrictions for England. Details are as follows:

Some COVID-19 restrictions were eased from 12 April:

- Self-contained accommodation will be able to open for overnight stays in England for people with their household or support bubble
- Outdoor hospitality venues will be able to reopen, with table service only
- Most outdoor attractions including zoos, theme parks, and drive-in performances (such as cinemas and concerts) will be able to reopen
- Some smaller outdoor events such as fetes, literary fairs, and fairgrounds will be able to take place
- Non-essential retail will be able to reopen
- Personal care premises such as hairdressers and nail salons will be able to reopen
- Public buildings such as libraries and community centres will be able to reopen
- Weddings, civil partnership ceremonies, wakes and other commemorative events will be able to take place for up to 15 people (anyone working is not included in this limit), including in indoor venues that are permitted to open or where an exemption applies. Wedding receptions can also take place for up to 15 people, but must take place outdoors, not including private gardens.



Key developments:

Guest accommodation providers such as hotels, B&Bs and caravan parks may only remain open for the specific reasons set out in law.

An event can take place at Step 2 (from 12 April) if all three of the following conditions are met:

1. The event takes place outdoors
2. Attendees are expected to arrive and leave the event in a staggered manner throughout the day
3. It does not involve attendees converging on and congregating in a site for a specific discrete performance or activity, such as a theatre or music performance, **OR** if it is a drive-in performance or show.

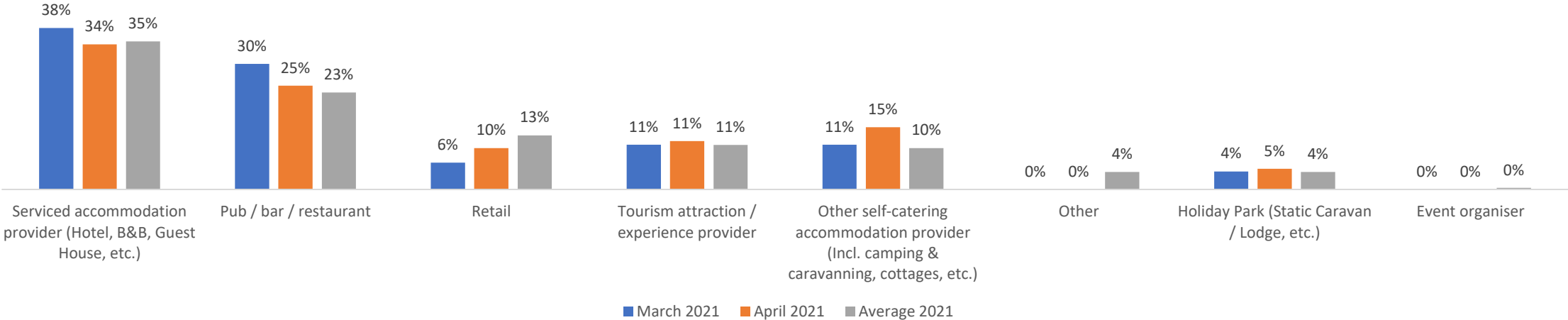


Research Outputs – Business Profile

About half (51%) respondents are accommodation providers. Of these, serviced accommodation businesses account for about a third (34%). Non-service include campsites, cottages (15% combined) and holiday parks (5%).

This month there has been an decrease in the proportion of pubs and restaurants (25%, down from 30%). The rest of the sample is made up of tourism attractions (11%) and retail (10%).

Type of Business



Q: What type of business do you run? (65)

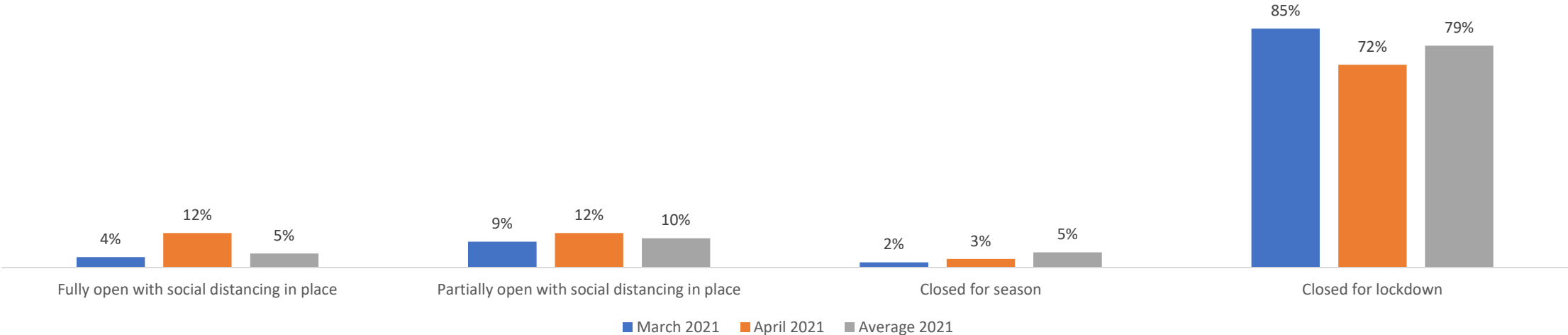


Research Outputs – Current Status

Businesses are slowly starting to reopen. However, more than seven in ten responds (72%) are still closed due to lockdown restrictions. A further 3% are closed for the season.

A quarter of respondents (24%) were open with social distancing measures in place, equally split between those being partially open businesses that were fully open.

Current Status of Business



Q: What is the current status of your business? (65)

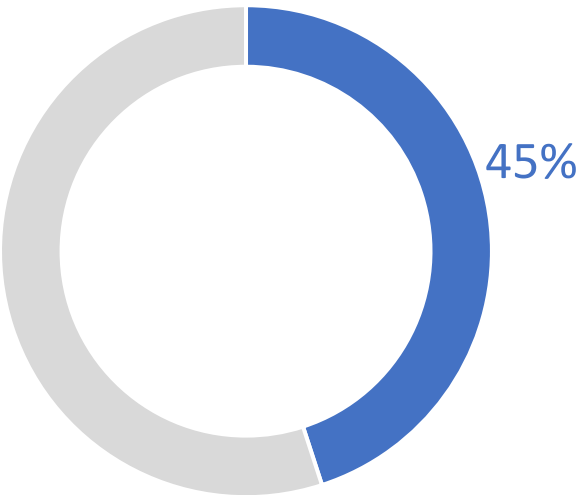


Research Outputs – Current Status

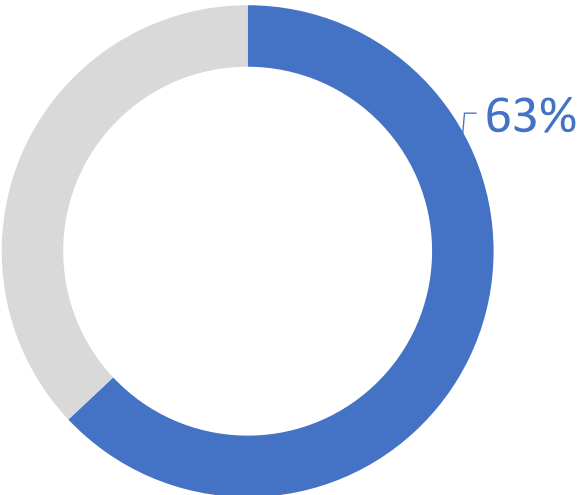
We noticed some significant increases in trading levels since last month. Businesses are operating at 45% of their usual capacity (up from 24% in march). As a result, their volume of trade during the week prior to completing the survey was 63% of the level achieved the same week the previous year (up from 41%).

Current staff levels account for 71% of the usual staff levels employed before the start of the pandemic (up from 40% in March).

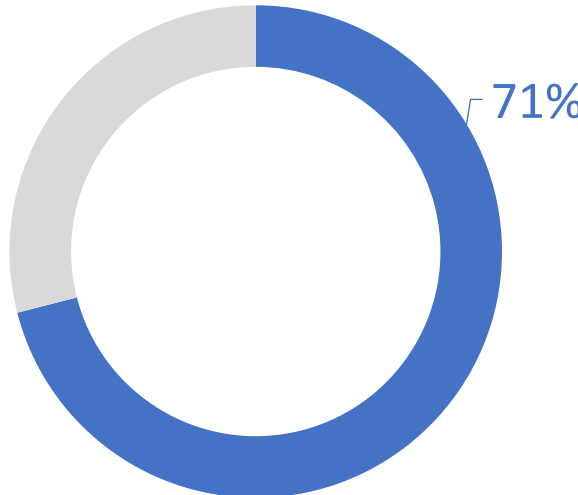
Percentage of usual capacity operating at



Percentage of trade last week compared to the same week last year



Percentage of usual staffing levels operating at



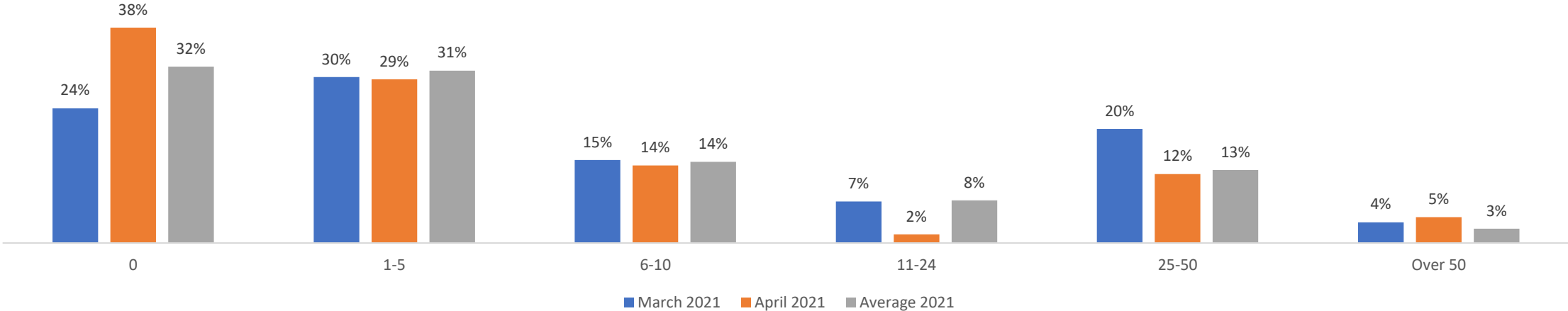
Q: If you are open, approximately what percentage of your usual capacity are you operating at? (65)
Q: What was your percentage of trade last week compared to the same week last year? (65)
Q: Approximately what percentage of your usual staffing levels are you operating at? (65)



Research Outputs – Staff and employment changes

There was a significant increase in the proportion of micro businesses, as 38% of respondents don't employ any staff other than the business owners. Three in ten (29%) employ between 1 and 5 members of staff. Businesses with 6 to 10 employees account for 14%, followed by the 25-50 (12%), larger businesses, with over 50 employees account for 5% of the sample and the 11-24 group for 2%.

Staff employed or expected to employ before the start of pandemic



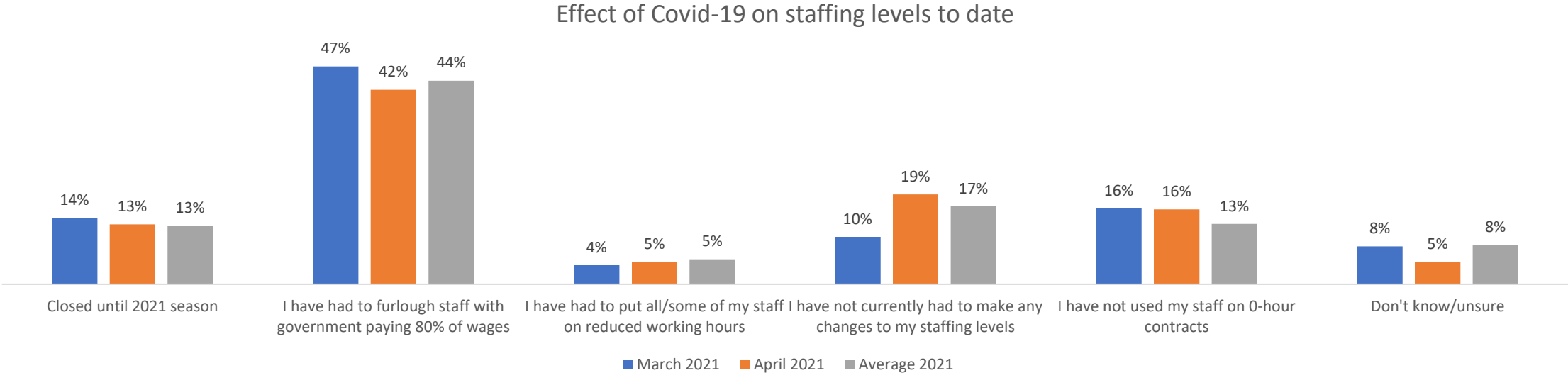
Q: How many staff did you employ or expected to employ before the start of the pandemic? (65)



Research Outputs – Staff and employment changes

The most significant effect of the pandemic was having to furlough staff with government paying 80% of wages, affecting 42% of respondents. Furthermore, 16% had not used their staff on 0-hour contracts and 5% had to put some or all of their staff on reduced working hours.

About two in ten (19%), didn't have to make any changes to their staff and a further 5% were unsure or unable to answer.



Q: What other effect has Covid-19 had on your staffing levels to date? (63)



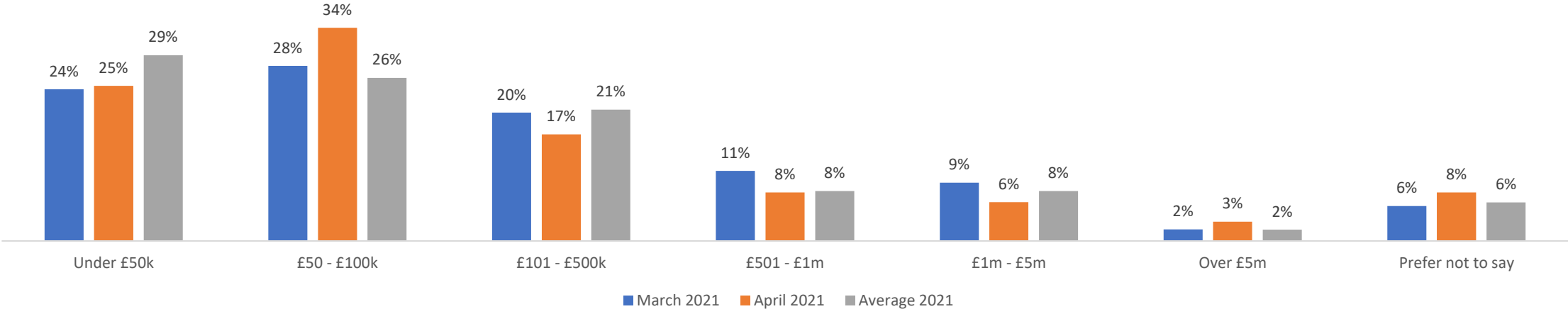
Research Outputs – Impact on business turnover

As mentioned earlier, a significant proportion of businesses taking part in the survey were smaller businesses and this is reflected on the turnover figures for 2019. A quarter (25%) achieved a turnover of under £50k, a further 34% made between £50k and £100k and 17% achieved a turnover of between £101k and £500k.

The remaining 17% include larger turnovers (8% achieved between half a million and a million pounds, 6% between one and five million and 3% over £5 million).

Note that 8% of respondents preferred not to disclose their performance information.

Company’s approximate turnover in 2019



Q: What was your company’s approximate turnover 2019? (64)

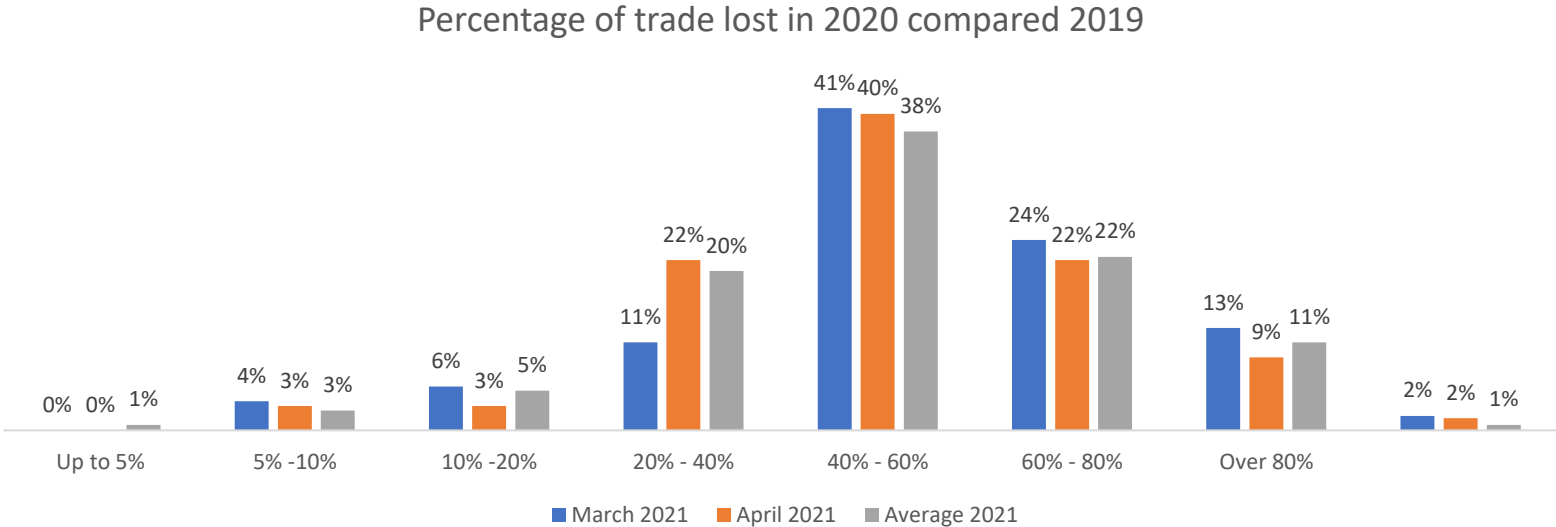
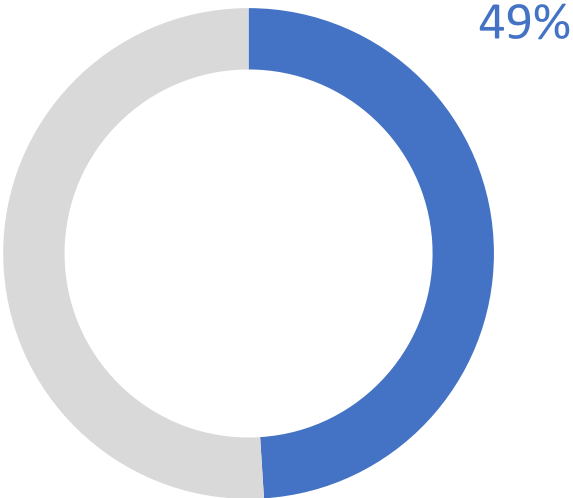


Research Outputs – Impact on business turnover

About two in five (40%) lost between 40% and 60% of turnover. Just over a quarter (28%) lost up to 40% of their 2020 turnover, compared to 2019. Of these, 22% lost between 20% and 40%, with the rest losing less than 20%.

One in five (22%) lost up to 80% and 9% suffering losses of more than 80% in trade, compared to 2019.

On average, businesses taking part in the survey saw a 49% loss in trade during 2020 compared 2019



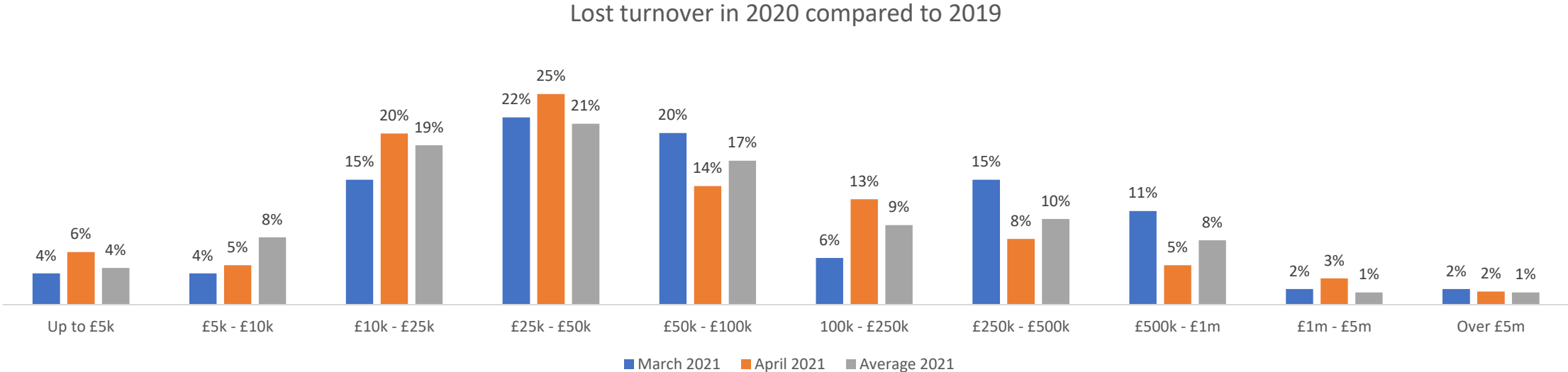
Q: If your trade has decreased what percentage of trade would you say you have lost in 2020 compared 2019? (63)



Research Outputs – Impact on business turnover

In most cases (70%), the loss of turnover in 2020 compared to 2019 was up to £100k. Of these, 31% lost up to £25k, with 25% loosing between £25k and £50k and 14% reporting losses of between £50k and £100k.

One in five (21%) report losses of between £100k and £500k and 10% lost over £500k.



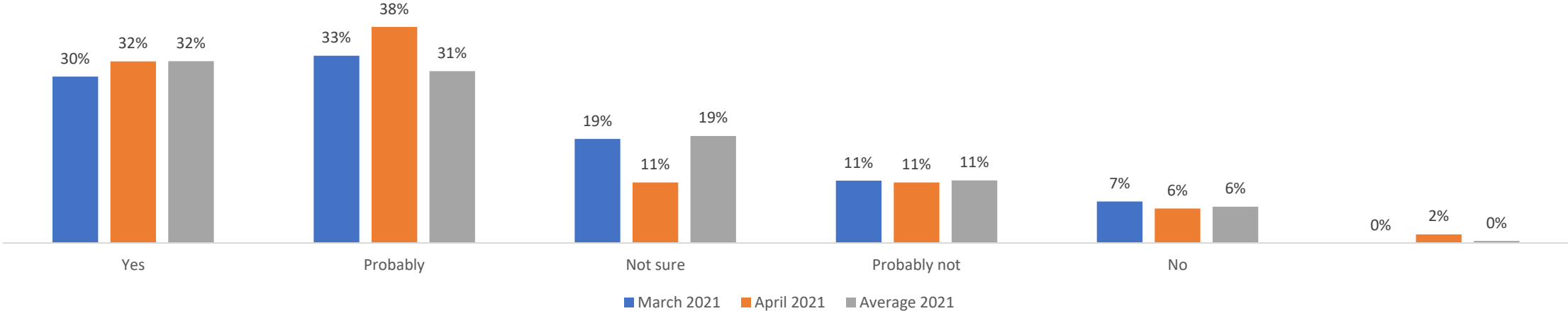
Q: Approximately how much could this mean in terms of lost turnover in 2020 compared to 2019? (64)



Research Outputs – Business Survival

Seven in ten businesses (70%) have a positive outlook on their likelihood of surviving the next three months. A further 11% are still not sure and 17% don't expect to survive longer than three months.

Survive for three months from now in the current situation



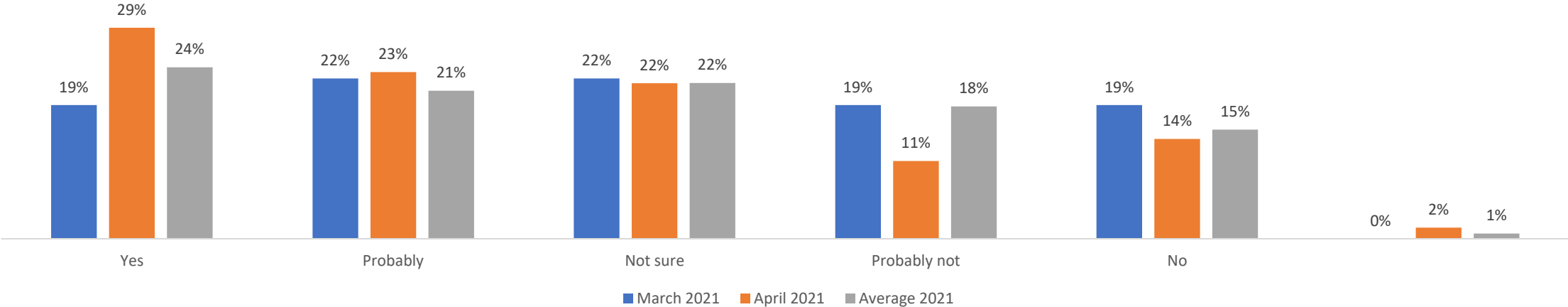
Q: Would your business survive for **three months** from now in the current situation? (65)



Research Outputs – Business Survival

Just over half (52%) are confident they will survive for six months in the current situation. Those 'not sure' about their survival after six months account for 22% of the sample. Importantly, a quarter (25%) think they probably won't survive after six months, which is down from 38% last month.

Survive for six months from now in the current situation



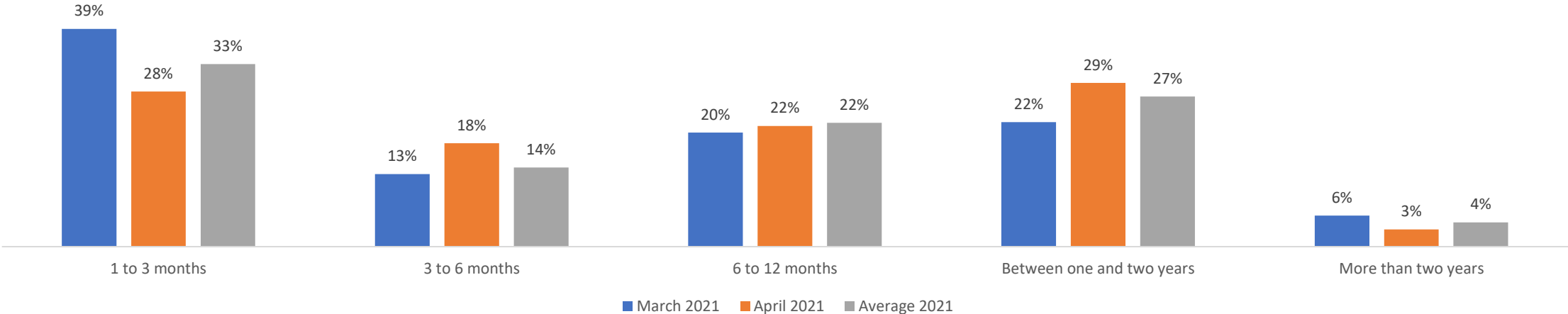
Q: Would your business survive for **six months** from now in the current situation? (65)



Research Outputs – Business Recovery

Should trading restrictions linked to Covid-19 end today, just under half of respondents (46%) are expecting to need up to 6 months (with 28% needing only up to 3 months). About two in five (22%) estimate that all trading restrictions were to end today, it would take their company between 6 months and a year to get back to business as usual. Finally, three in ten (29%) would expect to need between one and two years or in some cases even longer (3%) to recover.

Time required to get back to business as usual if Covid 19 and all trading restrictions were to end today

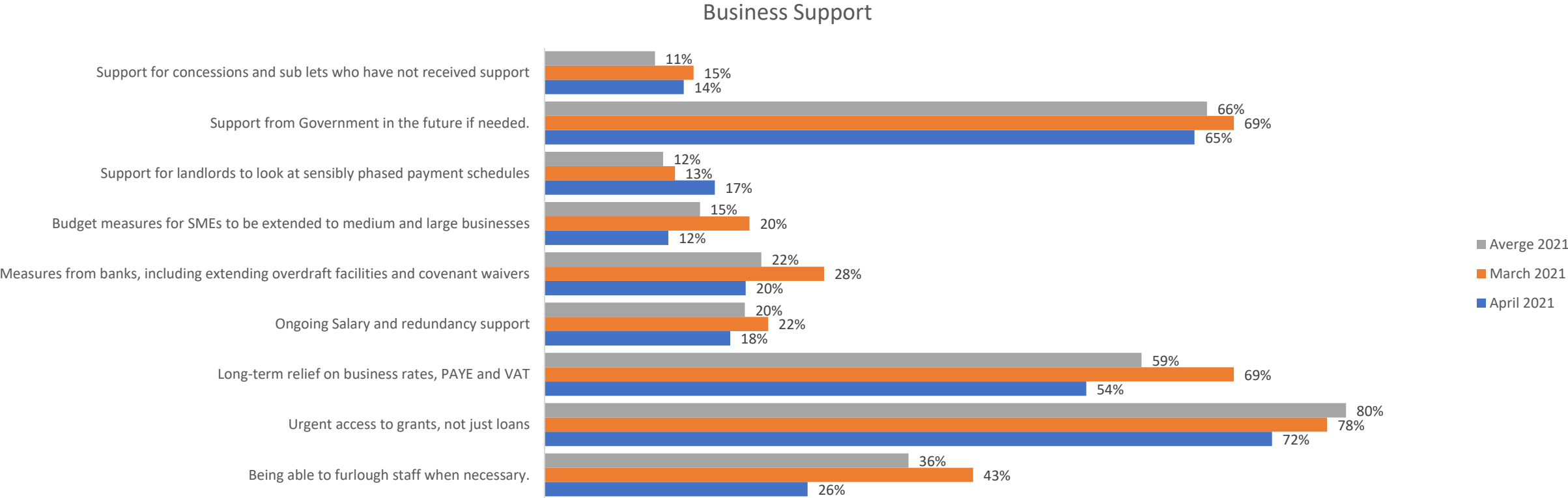


Q: If Covid 19 and all trading restrictions were to end today, how long would you estimate it would take for your company to get back to business as usual? (65)



Research Outputs – Business Support

Overall, there’s a general reduction in the dependency on Government support to secure business continuity. Just over seven in ten (72%) are requesting urgent access to grants, not just loans, and 65% say they will welcome support from government in the future, if needed. Those requesting long term relief on business rates, PAYE and VAT also account for 54% of respondents. A quarter (26%) would like to be able to furlough staff when necessary.

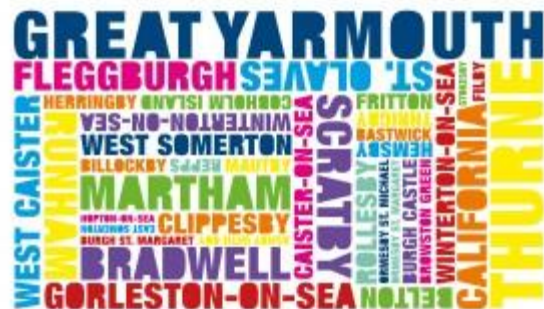


Q: What support from Government would be crucial for your business going forward? (64)





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