Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and Business Improvement Area

May 2021

Prepared by:

destinationresearch
delivering results : measuring what matters

On behalf of:

GREATER Yarmouth TOURISM & BUSINESS IMPROVEMENT AREA

VISIT GREAT YARMOUTH

Introduction and Methodology and approach

This report evaluates the immediate and ongoing impacts of Covid- 19 to Tourism Business in Greater Yarmouth, as we 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 GYTBIA.

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 60 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:

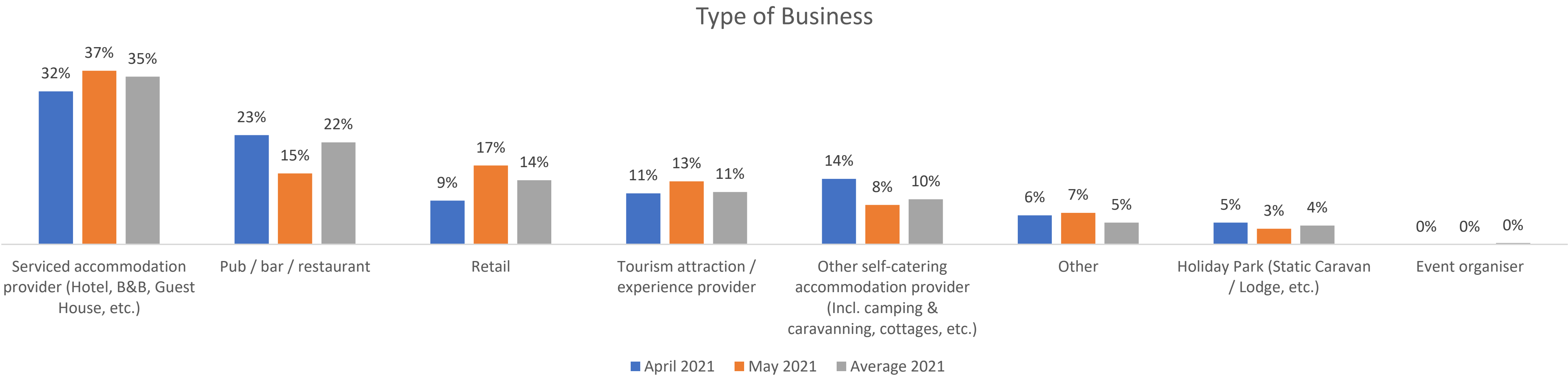
Some COVID-19 restrictions were eased from 17 May:

- **Gathering limits eased.** Outdoor gatherings limited to 30 people and indoor gatherings limited to 6 people or 2 households (each household can include a support bubble, if eligible).
- **Indoor entertainment and attractions permitted to open with COVID-secure measures in place** including cinemas, theatres, concert halls, bowling alleys, casinos, amusement arcades, museums and children's indoor play areas.
- **People able to attend indoor and outdoor events**, including live performances, sporting events and business events. Attendance at these events to be capped according to venue type, and attendees should follow the COVID-secure measures set out by those venues.
- **Indoor hospitality venues such as restaurants, pubs, bars and cafes can reopen.**
- **Organised indoor sport will be able to take place for all** (this includes gym classes). This must be organised by a business, charity or public body and the organiser must take reasonable measures to reduce the risk of transmission.
- **All holiday accommodation will be open** (including hotels and B&Bs). This can be used by groups of up to 6 or 2 households (each household can include a support bubble, if eligible).
- Limits at weddings, wake, funerals and other commemorative events will be increased to 30 people. Other significant life events, such as bar/bat mitzvahs and christenings, will also be able to take place with 30 people.
- **Internationally travel -** There will be a traffic light system for international travel, and you must follow the rules when returning to England depending on whether you return from a red, amber or green list country.

Research Outputs – Business Profile

Under half (48%) of respondents are accommodation providers. Of these, serviced accommodation businesses account for over a third (37%). Non-service include campsites, cottages (8% combined) and holiday parks (3%).

This month there has been a decrease in the proportion of pubs and restaurants (15%, down from 23%). The rest of the sample is made up of retail (17%) and tourism attractions (13%).

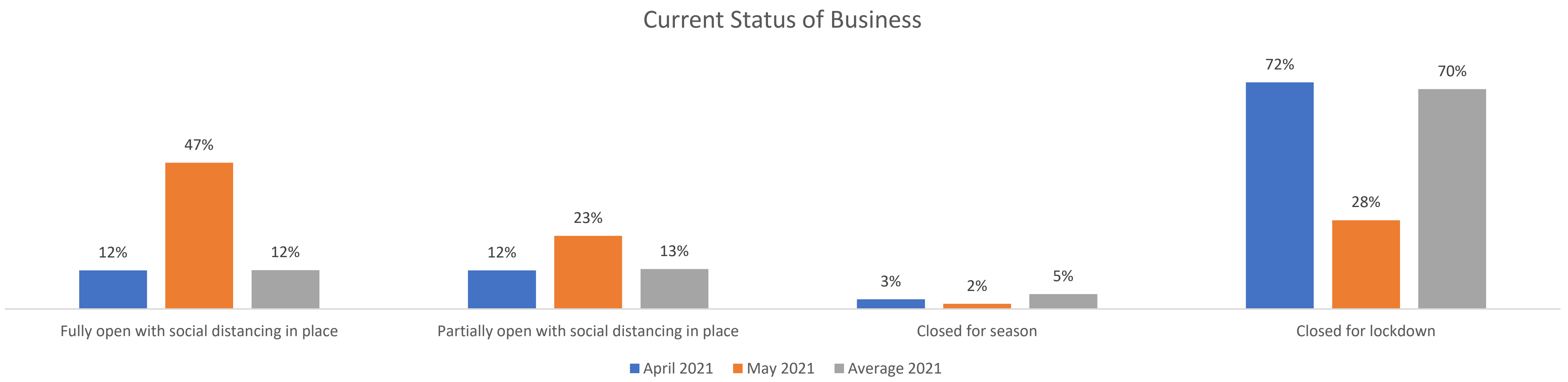


Q: What type of business do you run? *(60)*

Research Outputs – Current Status

There has been a marked change in the proportion of businesses that opened this month, with only 28% still closed due to lockdown restrictions. A further 2% are closed for the season.

Seven out of then respondents (70%) were open with social distancing measures in place, with 47% fully open and a further 23% being only partially open.

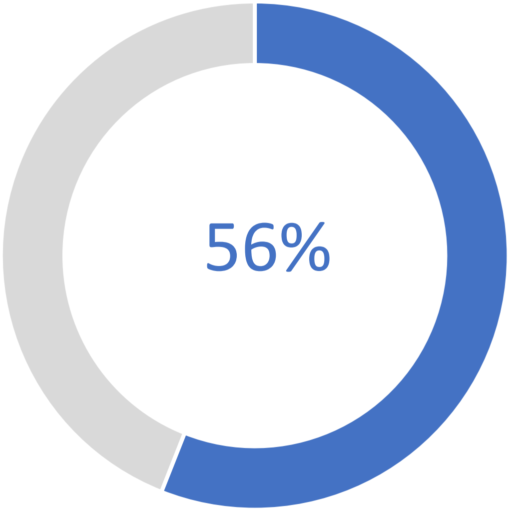


Q: What is the current status of your business? *(60)*

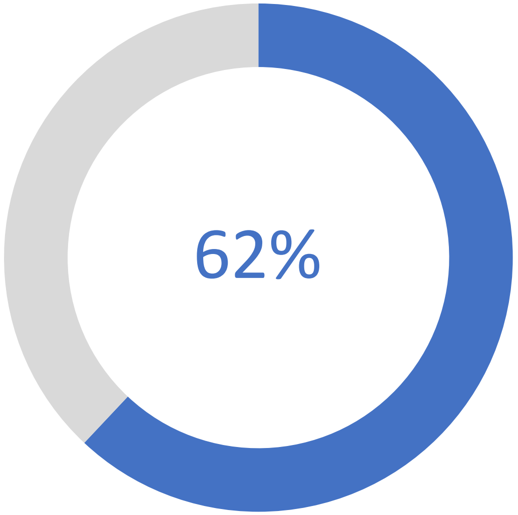
Research Outputs – Current Status

We noticed some continued increases in trading levels since last month. Businesses are operating at 56% of their usual capacity (up from 45% in April). As a result, their volume of trade during the week prior to completing the survey was 62% of the level achieved the same week the previous year. Current staff levels account for 78% of the usual number of staff employed before the start of the pandemic (up from 71% in April).

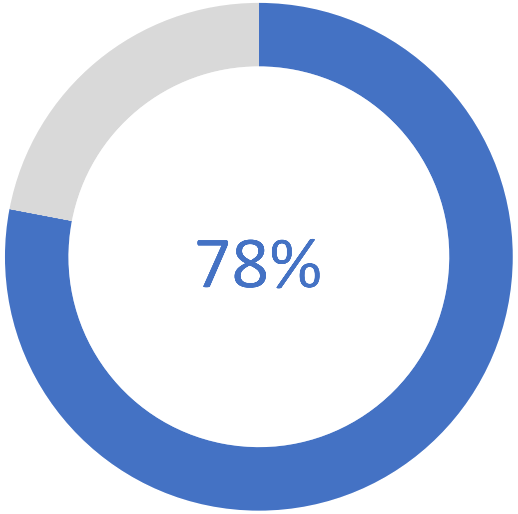
Percentage of usual capacity operating at



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



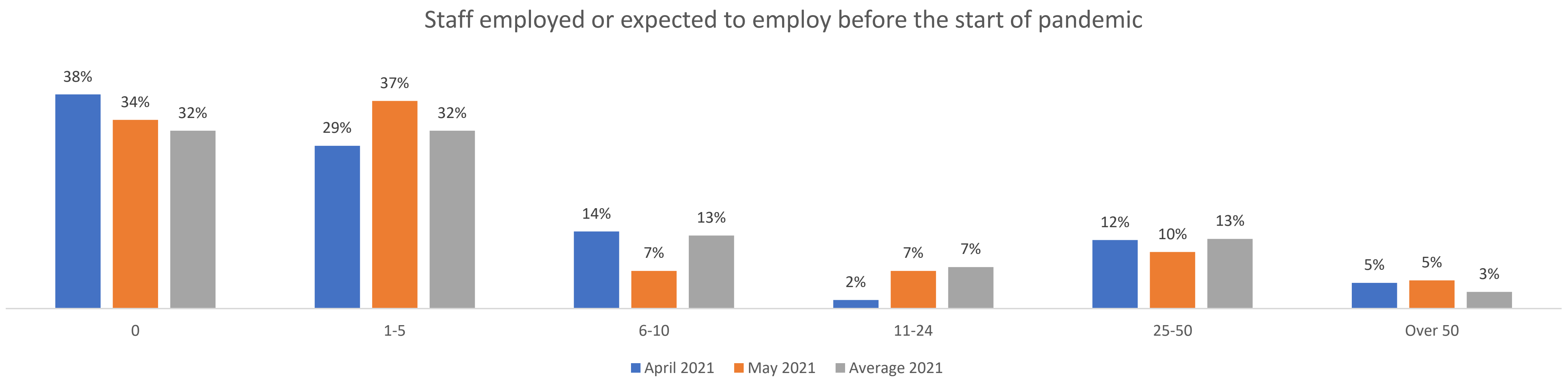
Percentage of usual staffing levels operating at



Q: If you are open, approximately what percentage of your usual capacity are you operating at? *(60)*
Q: What was your percentage of trade last week compared to the same week last year? *(60)*
Q: Approximately what percentage of your usual staffing levels are you operating at? *(60)*

Research Outputs – Staff and employment changes

There was a significant proportion of micro businesses, as 34% of respondents don't employ any staff other than the business owners. Almost two in five (37%) employ between 1 and 5 members of staff. Businesses with 25-50 employees account for 10%, followed by the 6 to 10 and the and the 11-24 employee groups (7% each). Larger businesses, with over 50 employees account for 5% of the sample.

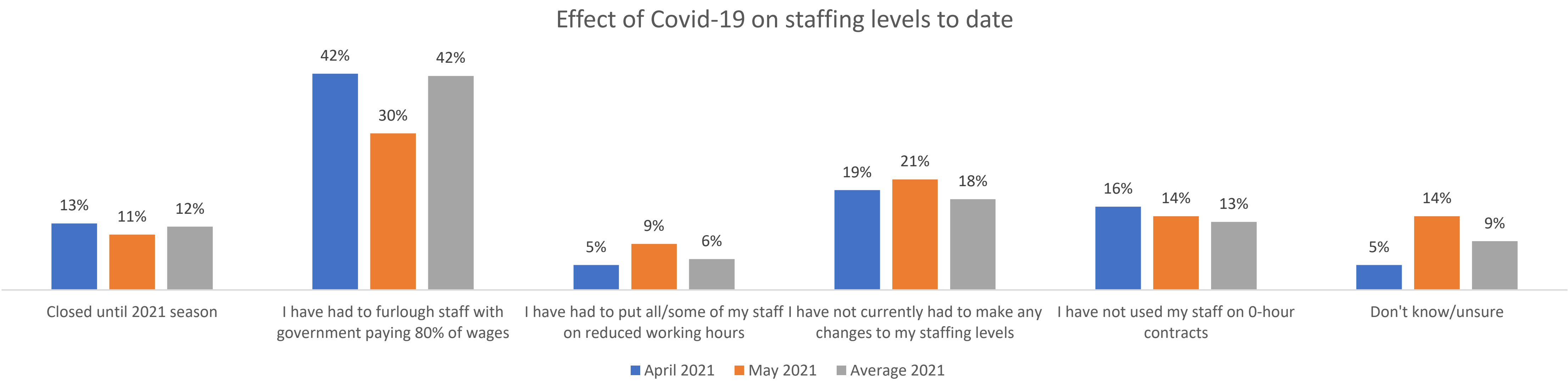


Q: How many staff did you employ or expected to employ before the start of the pandemic? *(60)*

Research Outputs – Staff and employment changes

The most significant effect of the pandemic was having to furlough staff with government paying 80% of wages. However, this is now only affecting 30% of respondents (compared to 42% in the previous moth). Other key results this month show that 14% had not used their staff on 0-hour contracts and 5% had to put some or all of their staff on reduced working hours.

Two in five (21%) didn't have to make any changes to their staff and a further 14% were unsure or unable to answer.

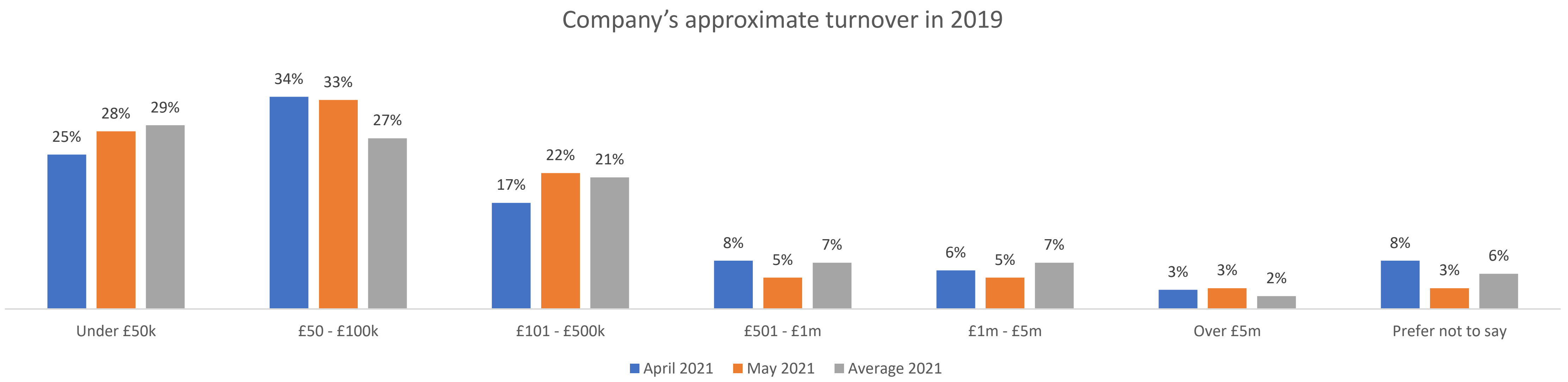


Q: What other effect has Covid-19 had on your staffing levels to date? *(59)*

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. Just over a quarter (28%) achieved a turnover of under £50k. A further 33% made between £50k and £100k and 22% achieved a turnover of between £101k and £500k.

The remaining 13% include larger turnovers (5% achieved between half a million and a million pounds, 5% between one and five million and 3% over £5 million. Note that 3% or respondents preferred not to disclose their performance information.



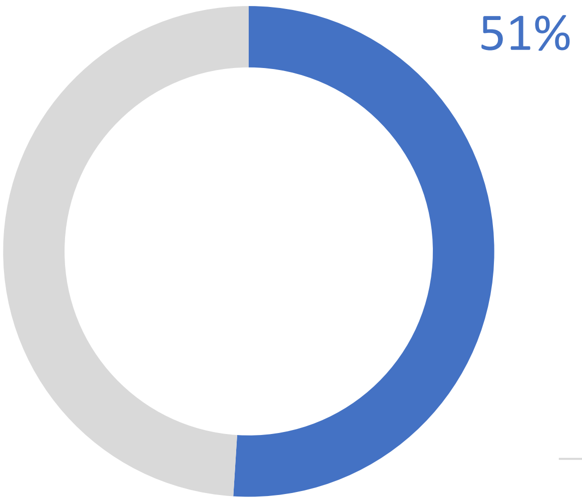
Q: What was your company's approximate turnover 2019? *(60)*

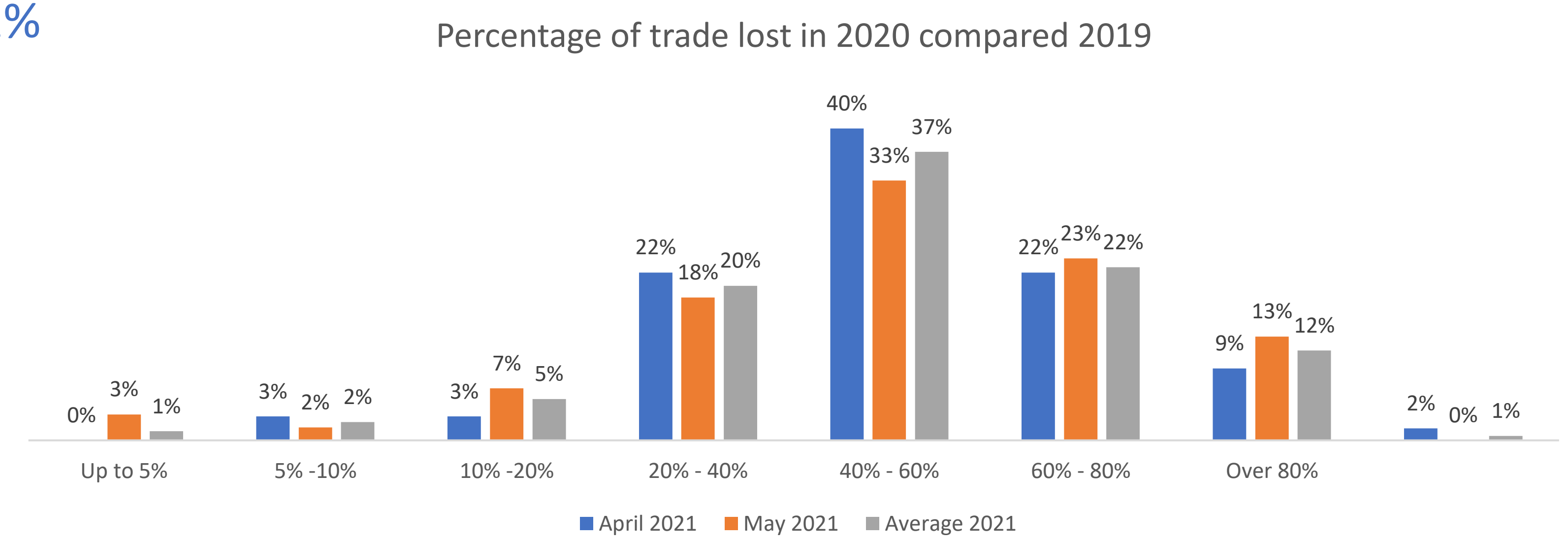
Research Outputs – Impact on business turnover

Looking at the ppercentage of trade lost in 2020 compared 2019, the results of the survey show that about a third (33%) lost between 40% and 60% of turnover. Just under a third (30%) lost up to 40% of their 2020 turnover, compared to 2019. Of these, 18% lost between 20% and 40%, with the rest losing less than 20%.

One in five (23%) lost up to 80%, with 13% suffering trade losses of more than 80%, compared to 2019.

On average, businesses taking part in the survey saw a 51% loss in trade during 2020, compared 2019

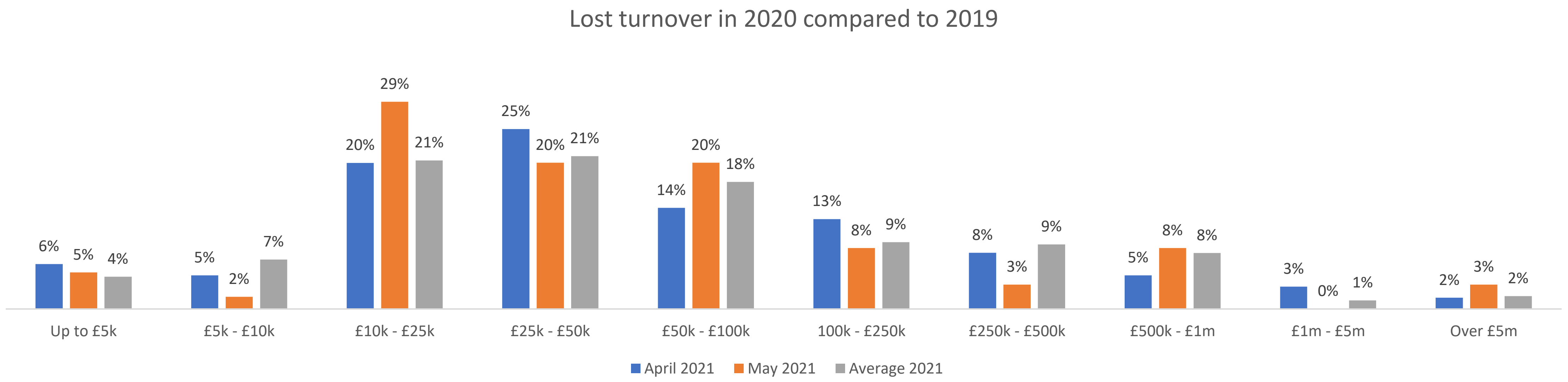




Research Outputs – Impact on business turnover

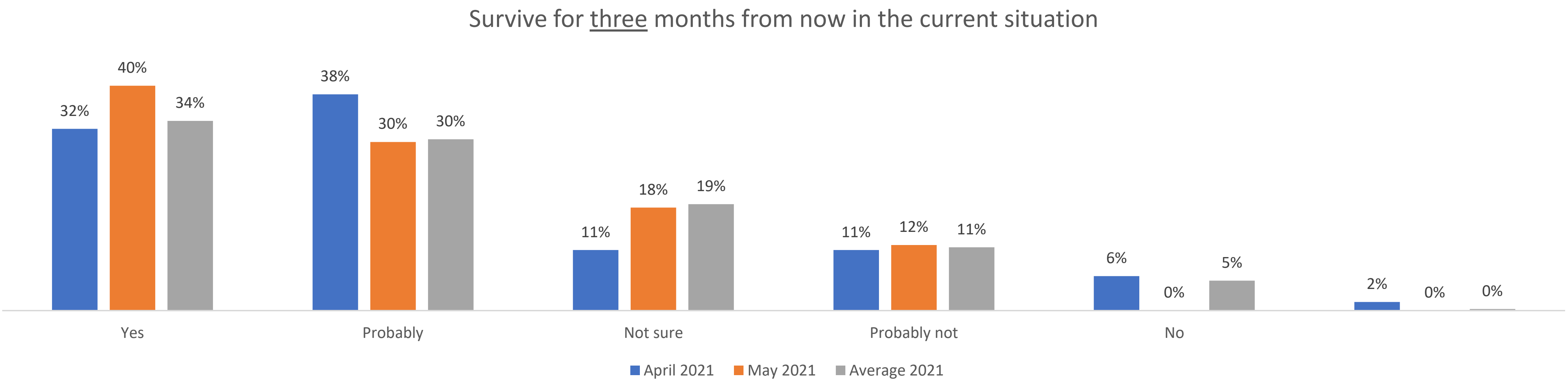
In most cases (76%), the loss of turnover in 2020 compared to 2019 was up to £100k. Of these, 36% lost up to £25k, with 29% loosing between £10k and £25k. Businesses reporting losses of between £25k and £50k and between £50k and £100k accounted for 20% each.

Just over one in ten (11%) reported losses of between £100k and £500k and 11% lost over £500k.



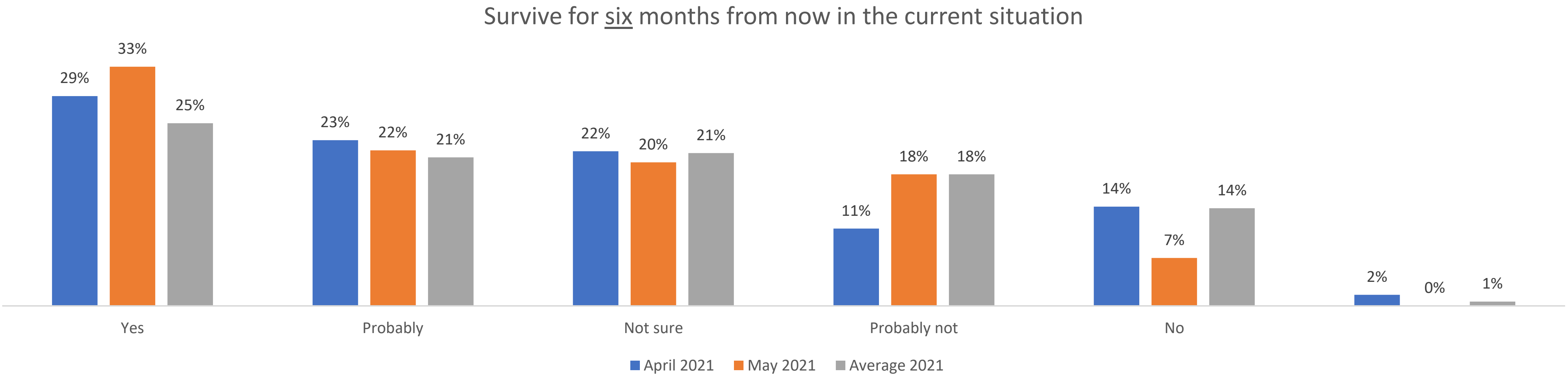
Research Outputs – Business Survival

Seven in ten businesses (70%) have a positive outlook on their likelihood or surviving the next three months. A further 18% are still not sure and 12% don't expect to survive longer than three months.



Research Outputs – Business Survival

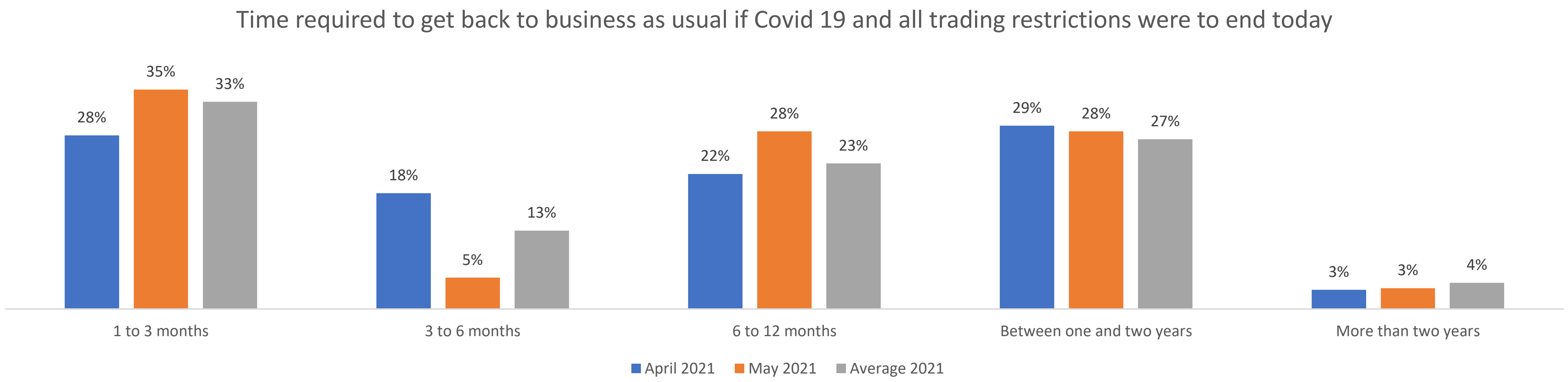
Just over half (55%) are confident they will survive for six month in the current situation. Those ‘not sure’ about their survival after six months account for 20% of the sample. Importantly, a quarter (25%) think they probably won’t survive after six months, unchanged from last month.



Q: Would your business survive for **six months** from now in the current situation? *(60)*

Research Outputs – Business Recovery

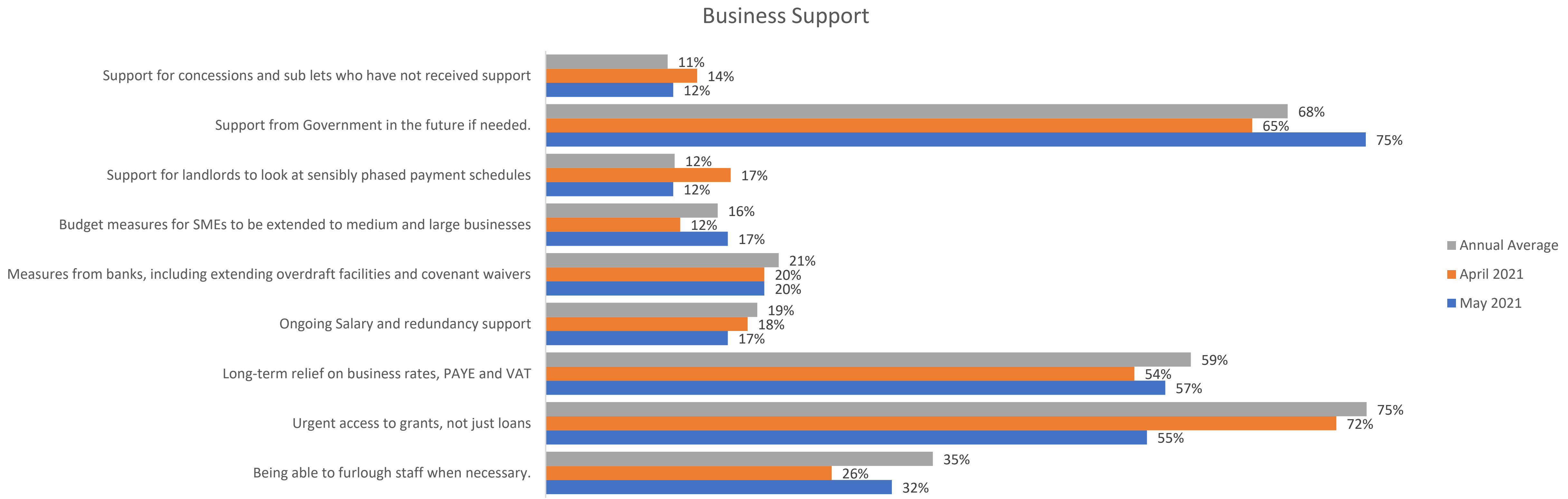
Should trading restrictions linked to Covid-19 end today, just under half of respondents (40%) are expecting to need up to 6 months (with 35% needing only up to 3 months). Just over a quarter (28%) estimate that all trading restrictions were to end today, it would take their company between 6 moths and a year to get back to business as usual. Finally, three in ten (28%) would expect to need between one and two years or in some cases even longer (3%) to recover.



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? *(60)*

Research Outputs – Business Support

Overall, there's less the dependency on Government support to secure business continuity compared to previous months. However, businesses are asking that support from Government be available in future if needed. Those requesting long term relief on business rates, PAYE and VAT account for 57% of respondents. And just over half (55%) are requesting urgent access to grants, not just loans, About a third (32%) would like to be able to furlough staff when necessary.



Q: What support from Government would be crucial for your business going forward? *(59)*

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