# Covid-19 – Online Tourism Business Survey

## Prepared for: Great Yarmouth Tourism and Business Improvement Area

June 2021

Prepared by:

destinationresearch
delivering results : measuring what matters

On behalf of:

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 45 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:

- The Government announced that England would remain in Step 3 until 19th July (albeit with a review after two weeks).

- The Government also updated the public guidance to take into account the changes to the Step 3 rules that will apply from 21st June until 19th July.
- From 21st June, the rules on the number of people who can attend a wedding or civil partnership ceremony, a wedding reception or civil partnership celebration, and a commemorative event will change.

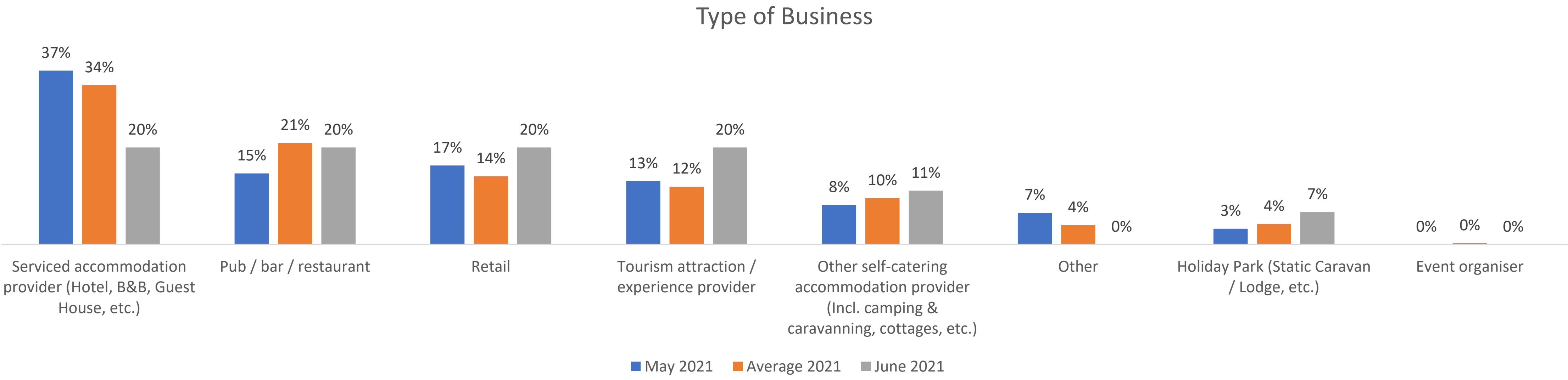
- The number of people who can attend these events in a COVID-Secure venue or other venues (such as a garden of a private home) will be determined by how many people a venue can safely accommodate with social distancing measures in place, including guests of all ages and anyone working at the event.

- Portugal removed from the green list. From 8th June, meaning that people arriving into the UK from Portugal after this time will have to self-isolate for 10 days.

## Research Outputs – Business Profile

Just under two in five (38%) of respondents were accommodation providers. Of these, serviced accommodation businesses account for one in five (20%). Non-service include campsites, cottages (11% combined) and holiday parks (7%).

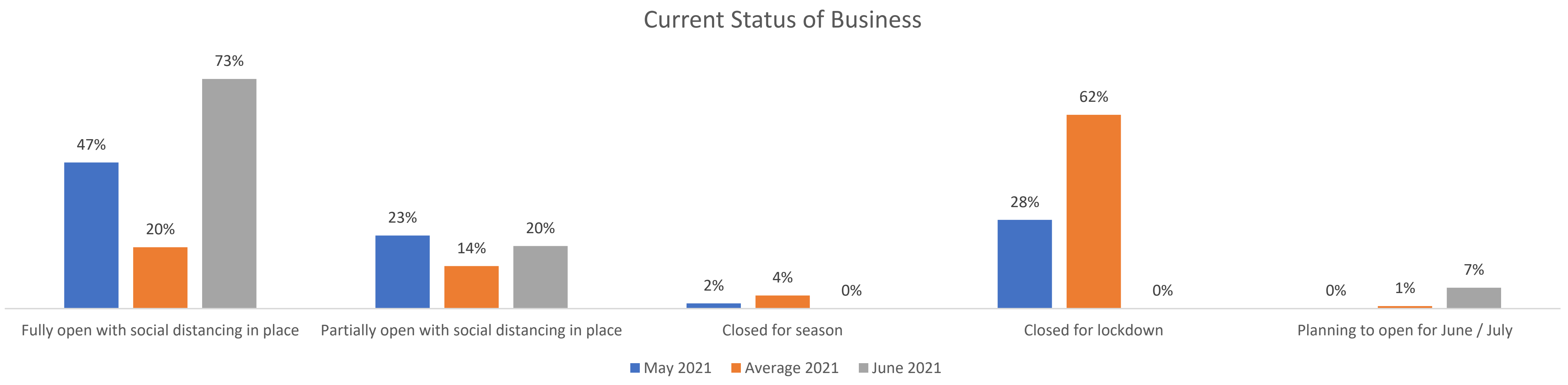
This month there has been an increase in the proportion of attractions (20%, up from 13%) and retail operators (20%, up from 17%).




Q: What type of business do you run? *(45)*

## Research Outputs – Current Status

The vast majority of respondents were open for business. Three quarters were fully open with social distancing measures in place (73%) and a further 20% were partially open. The remaining 7% are planning to open during June or July.

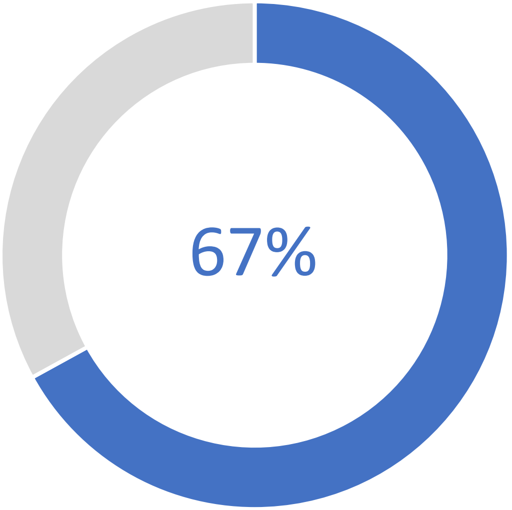



*Q:* What is the current status of your business? *(45)*

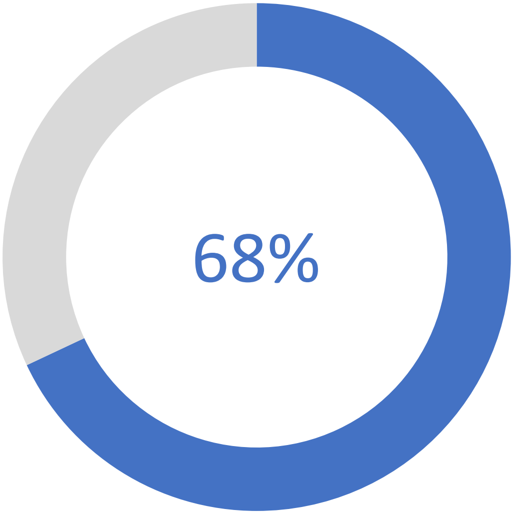
## Research Outputs – Current Status

We noticed some continued increases in trading levels since last month. Businesses were operating at 67% of their usual capacity (up from 56% in April). As a result, their volume of trade during the week prior to completing the survey was 68% of the level achieved the same week the previous year (62% in May). Current staff levels accounted for 80% of the usual number of staff employed before the start of the pandemic (up from 78% in May).

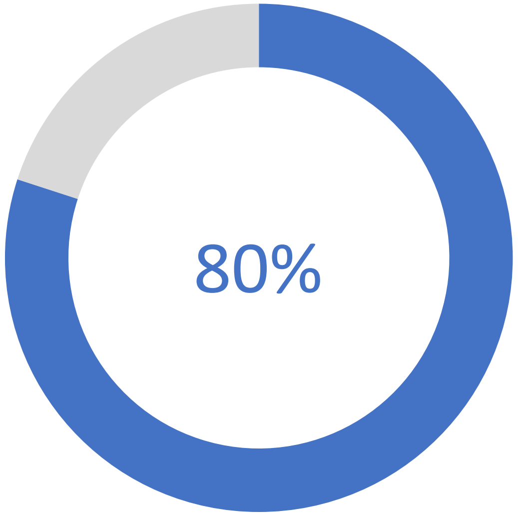
Percentage of usual capacity operating at




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



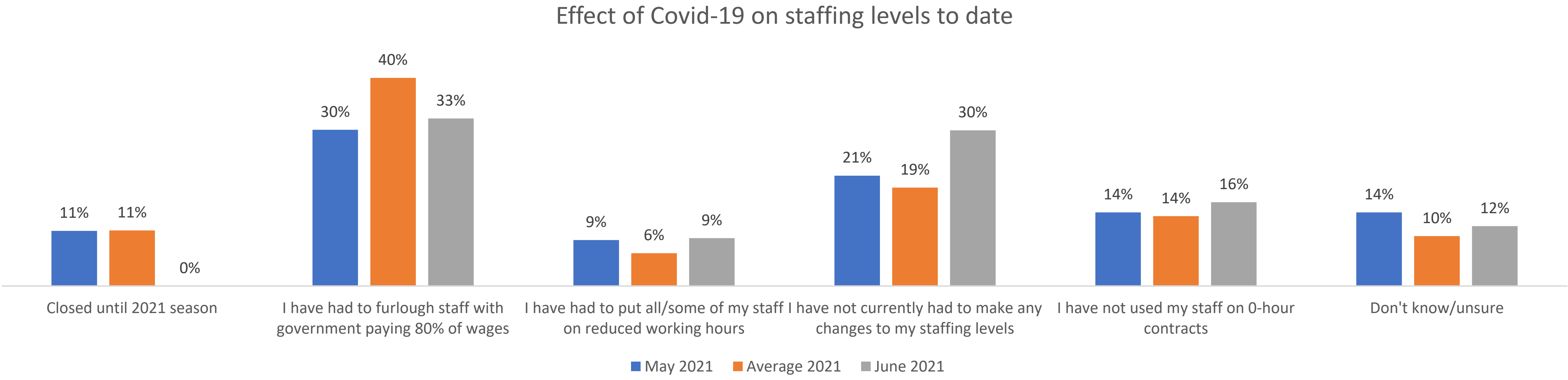

Percentage of usual staffing levels operating at




*Q:* If you are open, approximately what percentage of your usual capacity are you operating at? *(45)*
*Q:* What was your percentage of trade last week compared to the same week last year? *(45)*
*Q:* Approximately what percentage of your usual staffing levels are you operating at? *(44)*

## 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 33% of respondents. Almost a third (30%) say they did not have to make any changes to their staff and a further 12% were unsure or unable to answer.

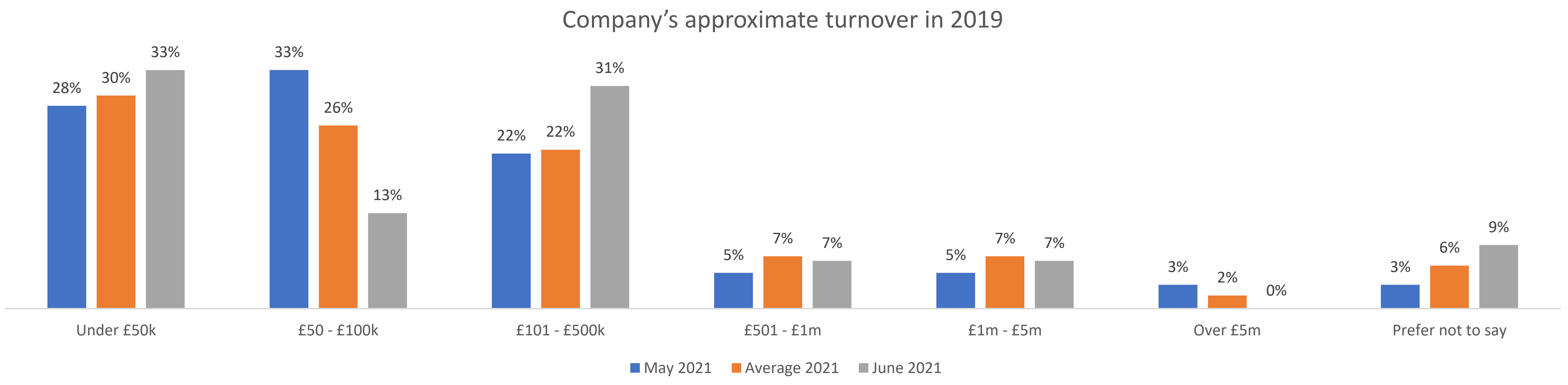



Q: What other effect has Covid-19 had on your staffing levels to date? *(45)*

# Research Outputs – Impact on business turnover

A third (33%) achieved a turnover of under £50k. A further 31% made between £101k and £500k and 13% achieved a turnover of between £50k and £100k.

The remaining 14% achieved between half a million and 5 million pounds (7% up to one million and a further 7% between one and five million). A significant minority (9%) preferred not to disclose their performance information.



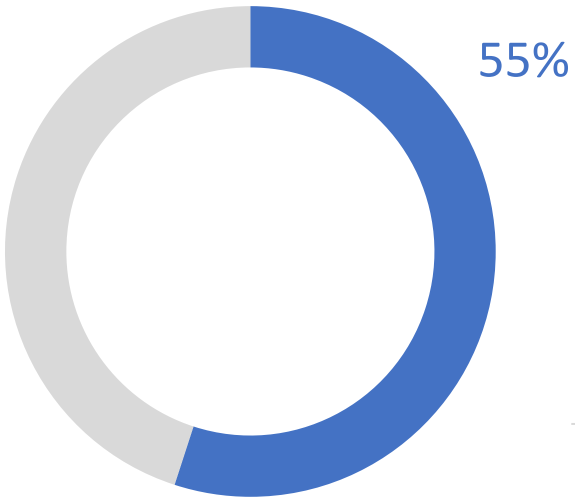

*Q:* What was your company's approximate turnover 2019? *(44)*

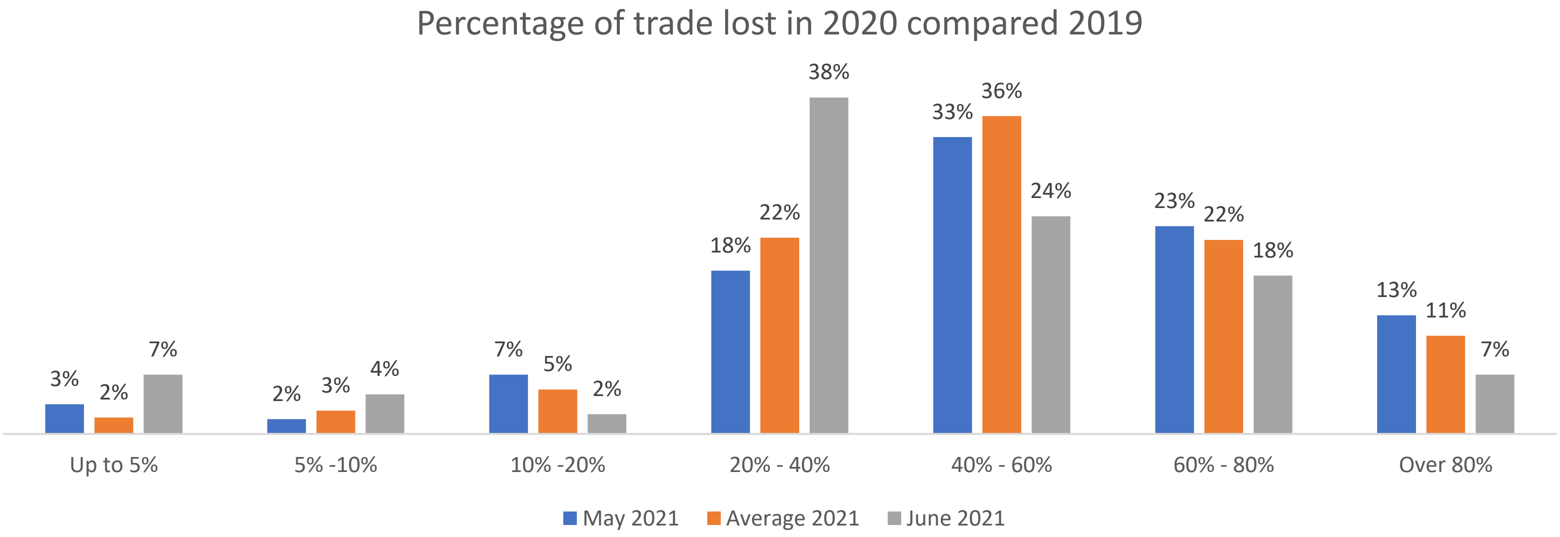
## Research Outputs – Impact on business turnover

Looking at the percentage of trade lost in 2020 compared 2019, the results of the survey show that almost two in five (38%) lost between 20% and 40% of turnover. Just under a quarter (24%) lost between 40%  and 60% of their 2020 turnover, when compared to 2019, with 13% losing less than 20%.

A quarter (25%) lost over 60%, of which 7% suffered trade losses of more than 80%, compared to 2019.

On average, businesses taking part in the survey saw a 55% loss in trade during 2020, compared 2019



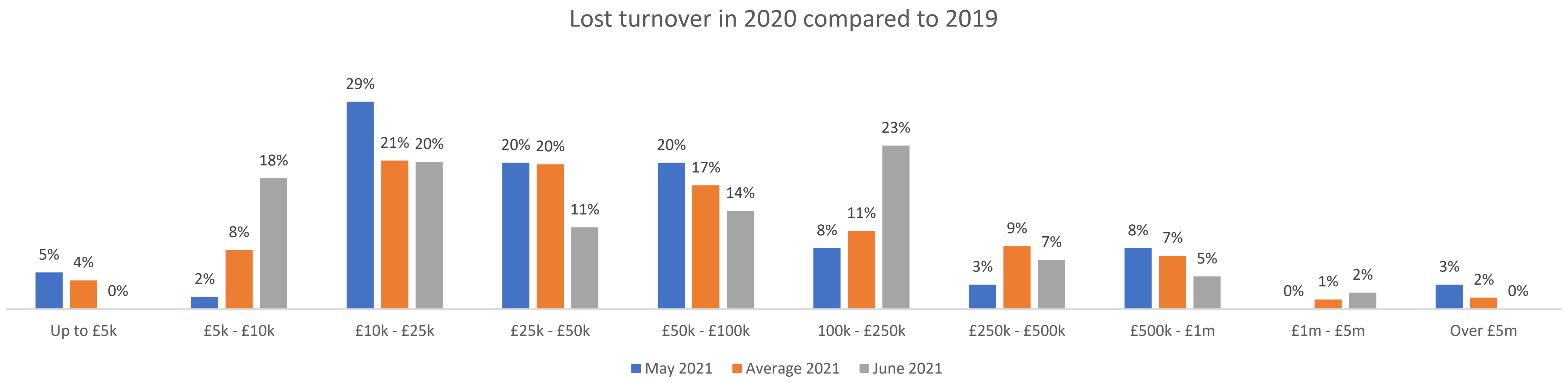




Q: If your trade has decreased what percentage of trade would you say you have lost in 2020 compared 2019? *(45)*

## Research Outputs – Impact on business turnover

In most cases (63%), the loss of turnover in 2020 compared to 2019 was up to £100k. Of these, 38% lost up to £25k, with 20% loosing between £10k and £25k. Businesses reporting losses of between £100k and £250k accounted for 23% each.

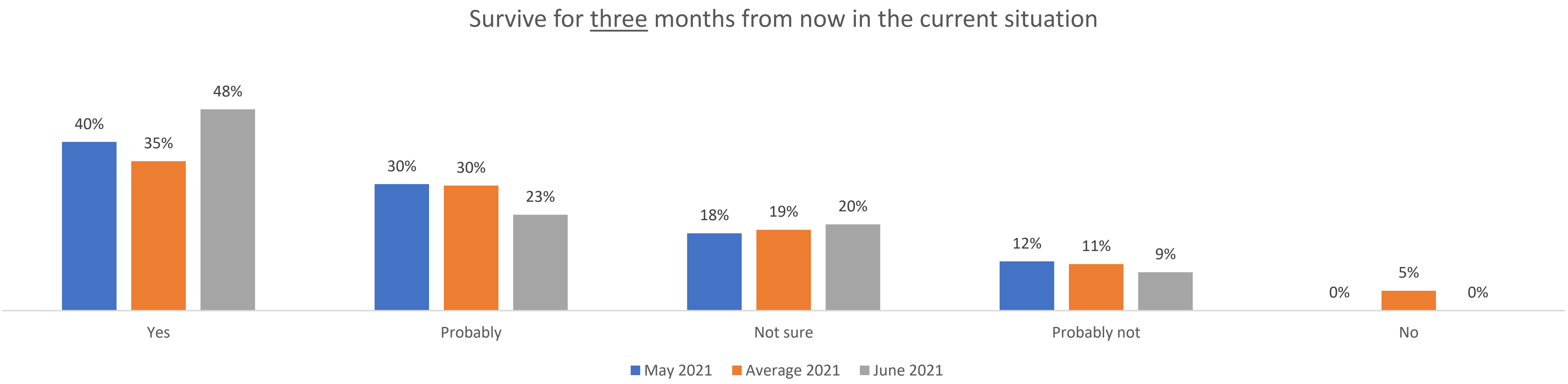
The remaining 14% of respondents reported losses above £250k.




*Q:* Approximately how much could this mean in terms of lost turnover in 2020 compared to 2019? *(45)*

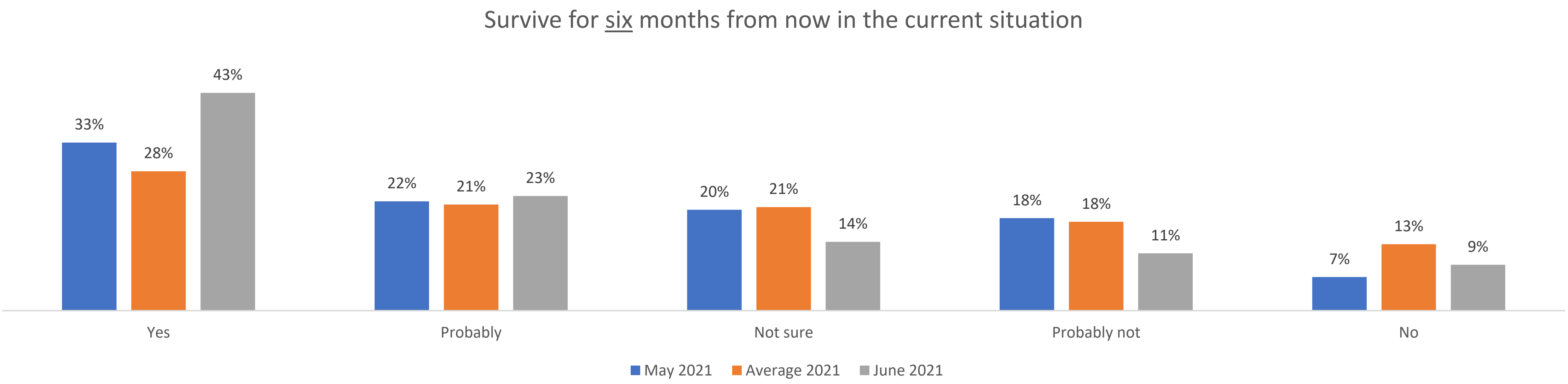
## Research Outputs – Business Survival

Seven in ten businesses (71%) have a positive outlook on their likelihood or surviving the next three months. A further 20% are still not sure and 9% don't expect to survive longer than three months.



## Research Outputs – Business Survival

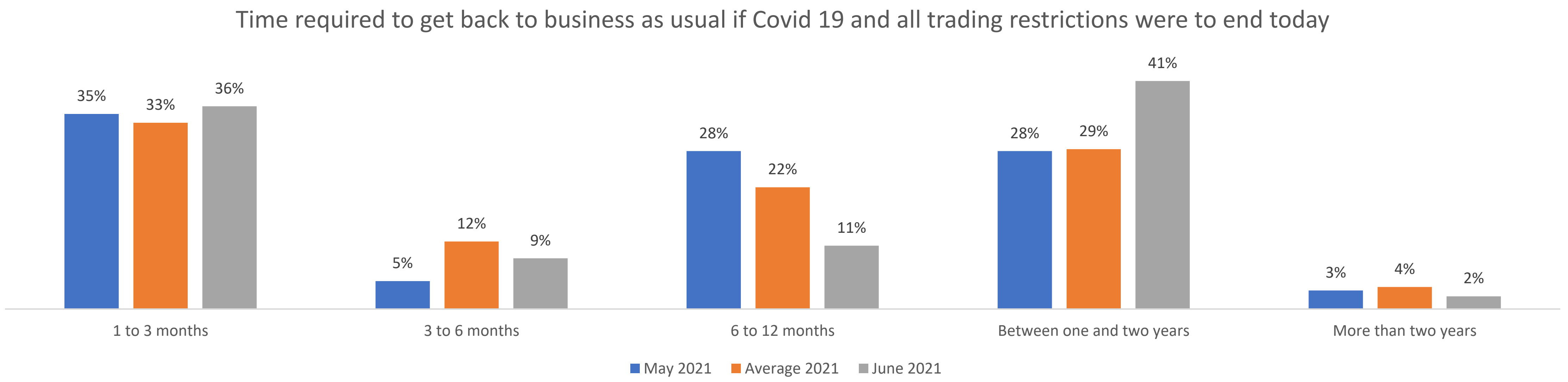
Two thirds of businesses (66%) are confident they will survive for six month in the current situation. Those 'not sure' about their survival after six months account for 14% of the sample. Importantly, one in five (20%) think they probably won't survive after six months, unchanged from last month.




*Q:* Would your business survive for **six months** from now in the current situation? *(45)*

## Research Outputs – Business Recovery

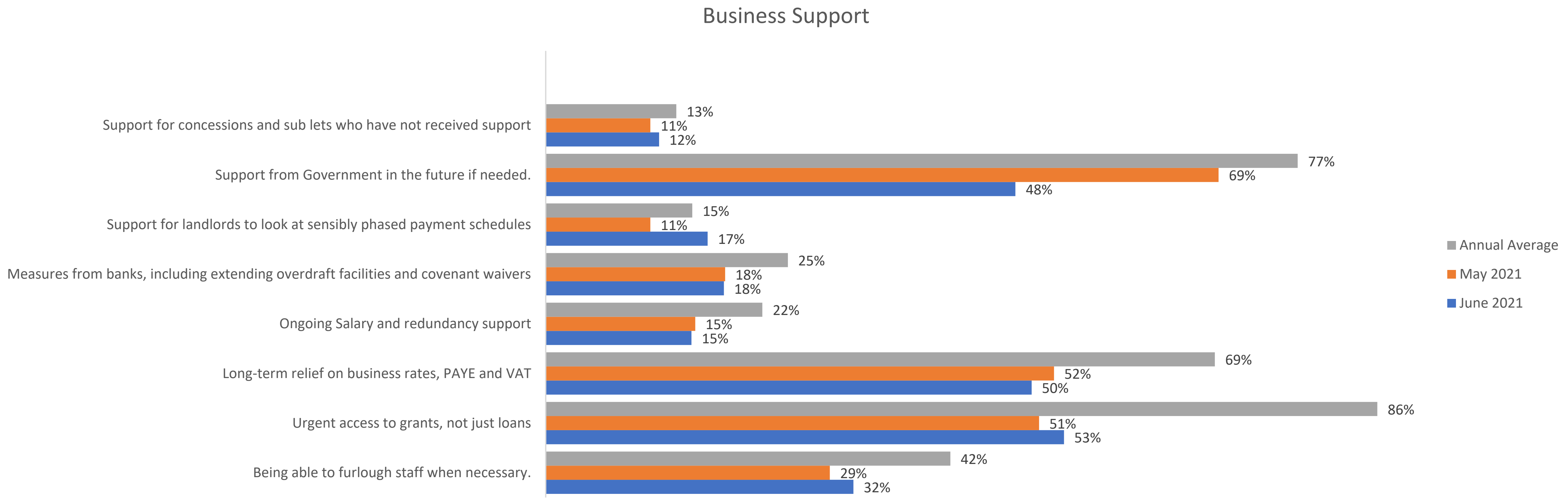
Should trading restrictions linked to Covid-19 end today, just under half of respondents (45%) are expecting to need up to 6 months (with 36% needing only up to 3 months only). Two in five (41%) estimate that all trading restrictions were to end today, it would take their company between one and two years. Finally, 11% expect to need between 6 moths and a year to recover and a small minority (2%) will need at least two years to get back to normal.




*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? *(45)*

## Research Outputs – Business Support

Overall, there's less the dependency on Government support to secure business continuity compared to previous months. However, about half (48%) of all 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 50% of respondents. And just over half (53%) 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? *(44)*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