

# Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and  
Business Improvement Area

October 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 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 42 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**

### **International Travel update for the UK**

From Monday 11 October the UK will remove 47 destinations from the red list leaving a smaller red list consisting of Peru, Ecuador, Colombia, Panama, Dominican Republic, Haiti and Venezuela in place to protect public health.

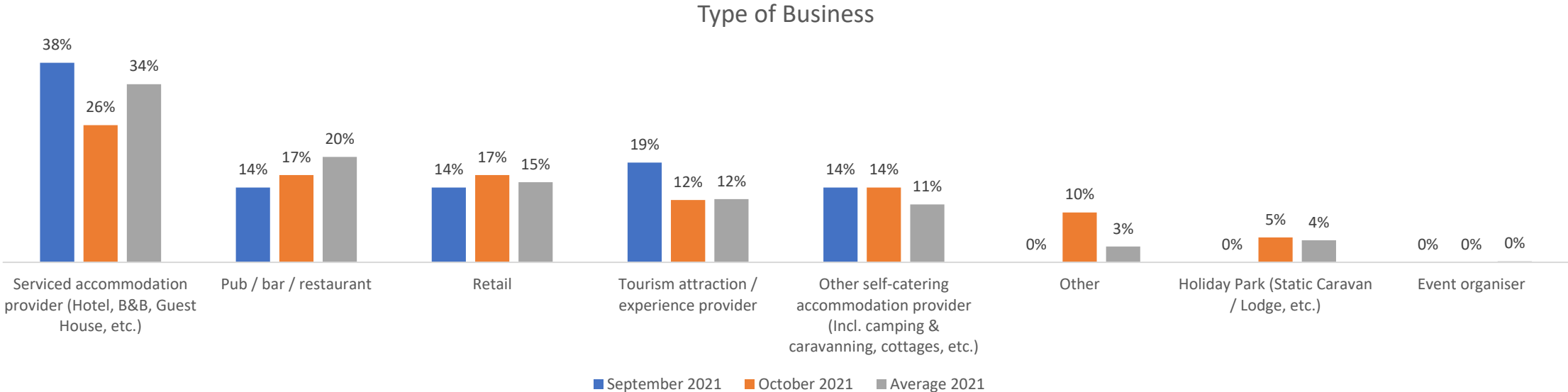
There are also changes in rules for travellers visiting the UK with vaccine certificates from more countries to be recognised to allow quarantine-free travel to the UK.

Certificates from a further 37 countries will be recognised, as well as those issued under the United Nations vaccination programme.



## Research Outputs – Business Profile

Just under half (45%) were accommodation providers. Of these, serviced accommodation businesses accounted for 26%. Non-service including campsites and cottages accounted for 19%. Tourist attractions accounted for 12%, with retail and catering (pubs, bars and restaurants) accounting for 17% each.

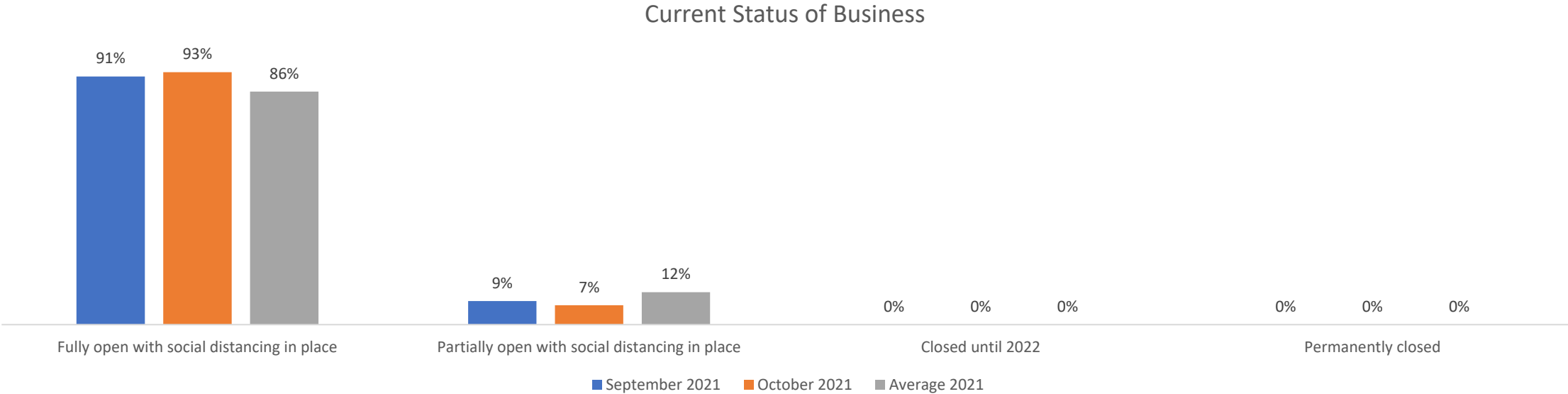


Q: What type of business do you run? (42)



## Research Outputs – Current Status

All respondents were open for business. Of these, 93% were fully open with social distancing measures in place and the remaining 7% were partially open.



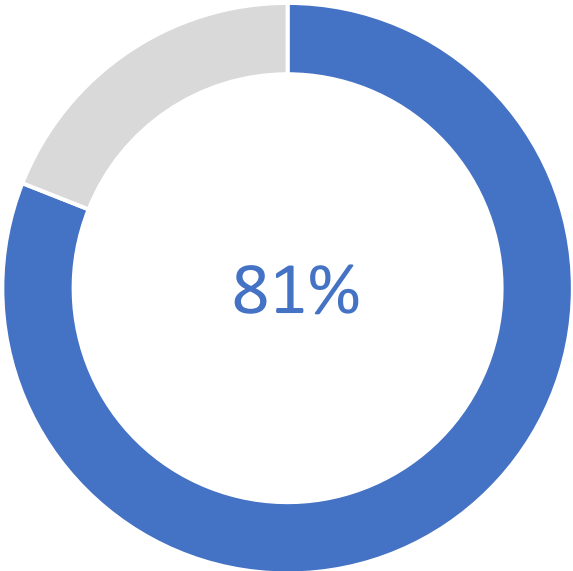
Q: What is the current status of your business? (41)



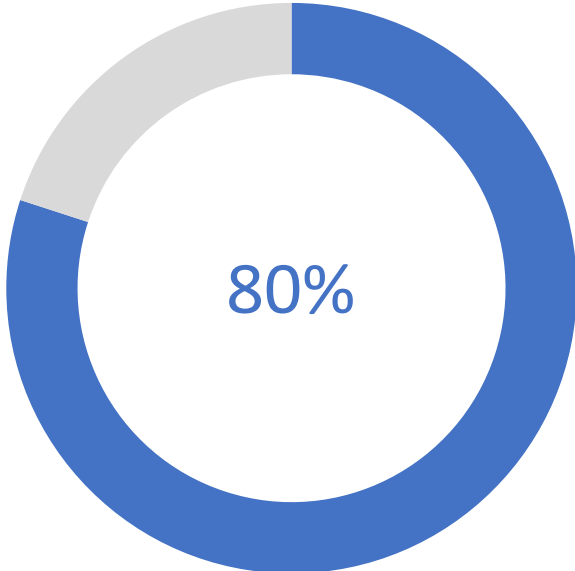
## Research Outputs – Current Status

We noticed slight variations in trading levels since last month. Businesses were operating at 81% of their usual capacity (from 83% in September). As a result, their volume of trade during the week prior to completing the survey was 80% of the level achieved the same week the previous year (81% in September). Current staff levels accounted for 93% of the usual number of staff employed before the start of the pandemic (down from 92% in September).

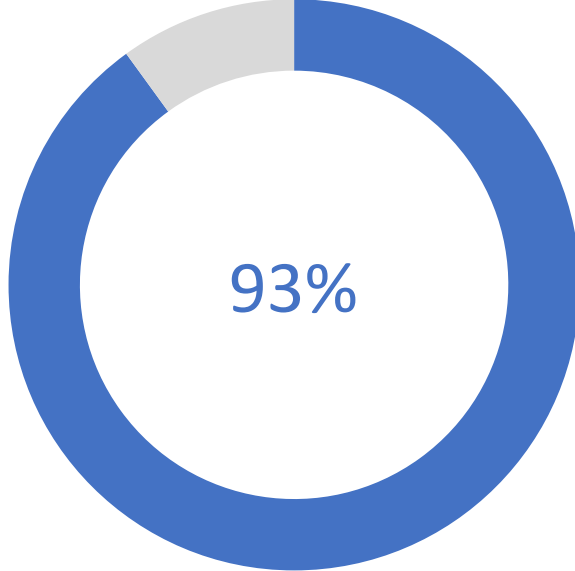
Percentage of usual capacity operating at



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? (42)  
Q: What was your percentage of trade last week compared to the same week last year? (42)  
Q: Approximately what percentage of your usual staffing levels are you operating at? (41)

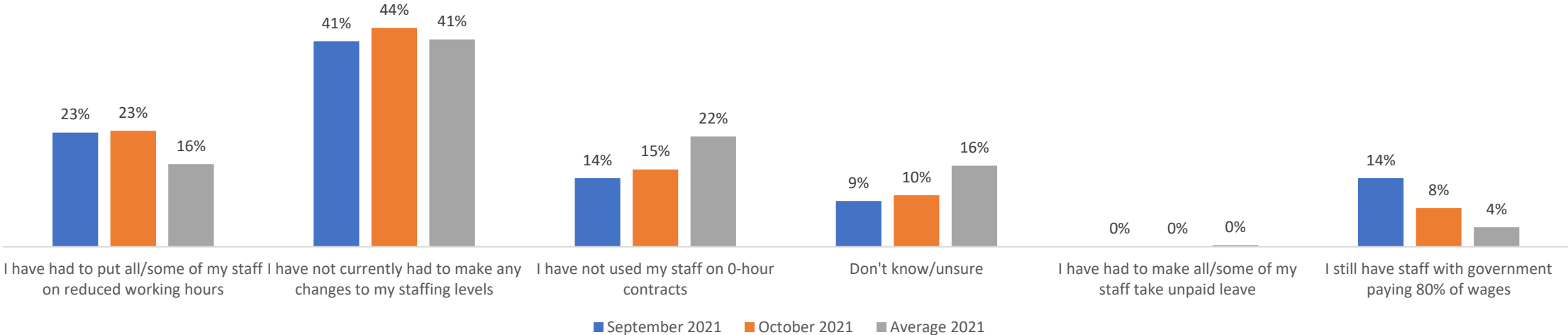


## Research Outputs – Staff and employment changes

The most significant effect of the pandemic was having to furlough staff with government paying 80% of wages. However, this is now only affecting 8% of respondents. Just over two in five (44%) say they did not have to make any changes to their staff.

There was a slight increase in the proportion of respondents saying they had not used their 0-hour contracts (15% up from 14% in September). The proportion of businesses that had to put all/some of their staff on reduced working hours was unchanged from last month, at 23%.

Effect of Covid-19 on staffing levels to date



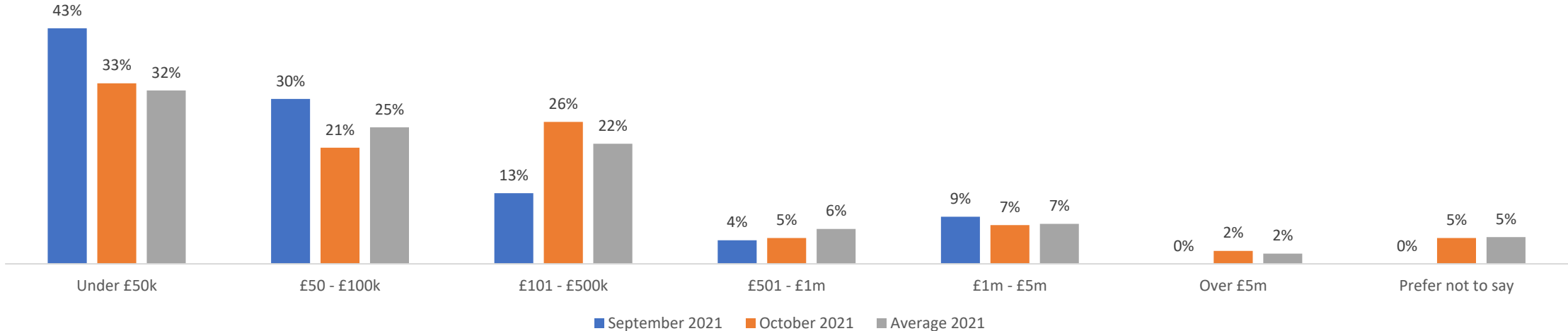
Q: What other effect has Covid-19 had on your staffing levels to date? (42)



## Research Outputs – Impact on business turnover

A third (33%) achieved a turnover of under £50k and for a further 21% it was between £50k and £100k. Just under half (45%) achieved a turnover or over £100k. Of these, 26% made between £101k and £500k and the rest accounts for businesses with turnovers above £500k.

Company’s approximate turnover in 2019



Q: What was your company’s approximate turnover? (42)

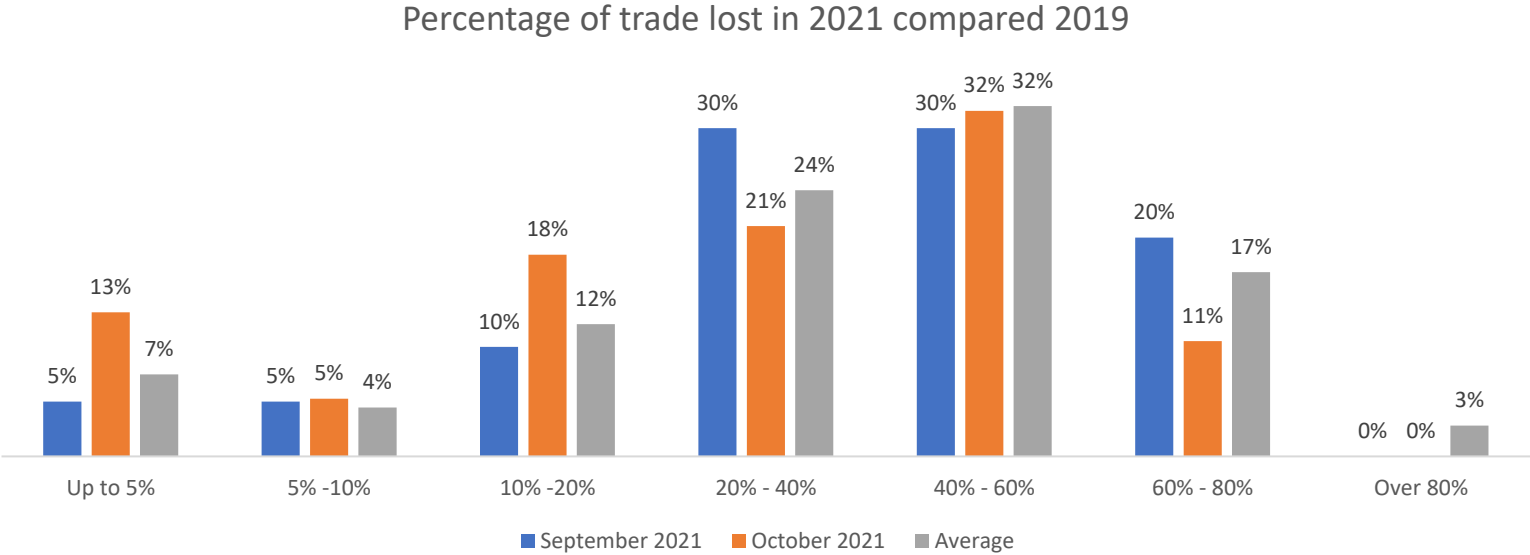
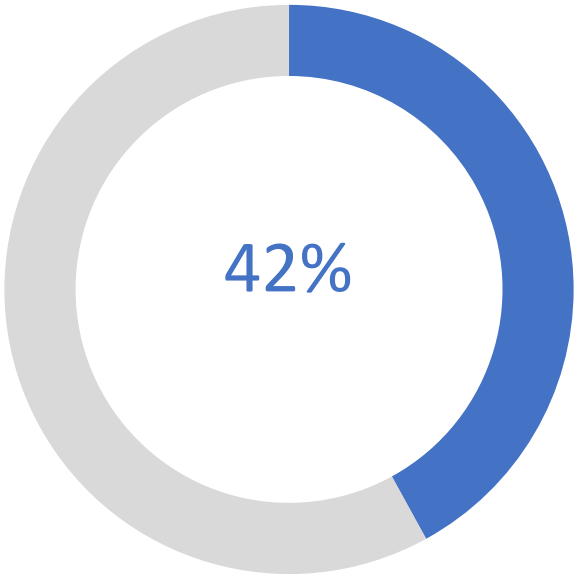




## Research Outputs – Impact on business turnover

Looking at the percentage of trade lost in 2021 compared 2019, the results of the survey show that about a third (36%) lost less than 20% of trade. One in five (21%) lost between 20% and 40% of turnover. A further 32% lost between 40% and 60% and 11% lost between 60% and 80% of their turnover, when compared to 2019.

On average, businesses taking part in the survey saw a 42% loss in trade during 2021, compared 2019

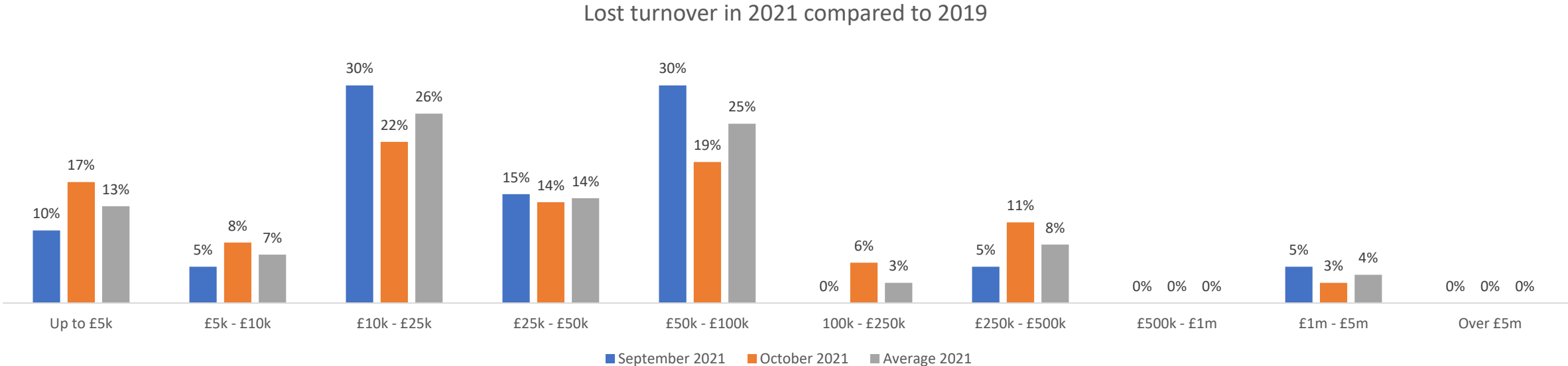


Q: If your trade has decreased what percentage of trade would you say you have lost in 2021 compared 2019? (38)



## Research Outputs – Impact on business turnover

In most cases (61%), the loss of turnover in 2021 compared to 2019 was up to £50k. Of these, 47% lost up to £25k, with 17% losing up to £5k. Businesses reporting losses of between £50k and £100k accounted for 19% and a further 11% reported losses of between £100k and £250k. The remaining 3% of respondents reported losses above £250k.



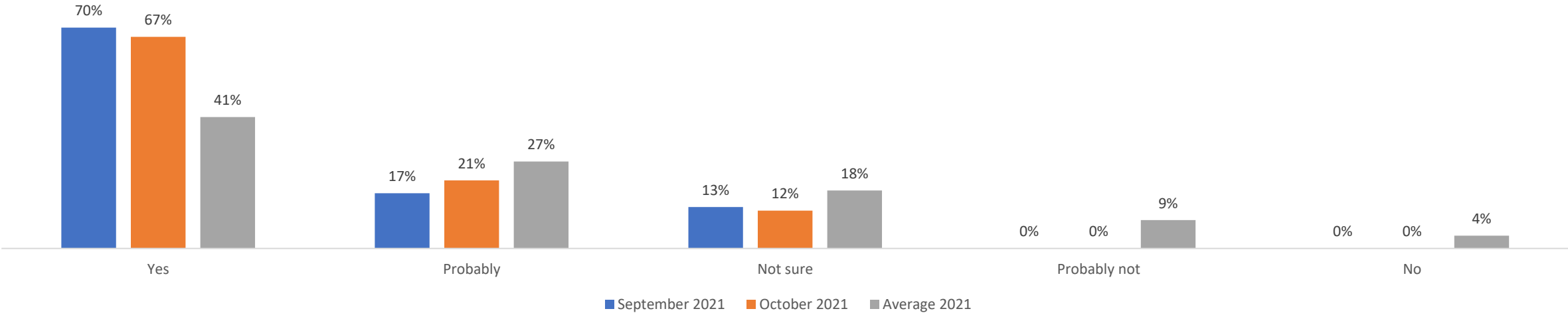
Q: Approximately how much could this mean in terms of lost turnover in 2021 compared to 2019? (41)



## Research Outputs – Business Survival

It is encouraging to see that almost all respondents are expecting to survive the next three months. Just under nine in ten businesses (88%) have a positive outlook on their likelihood or surviving the next three months. A further 12% are still not sure.

Survive for three months from now in the current situation



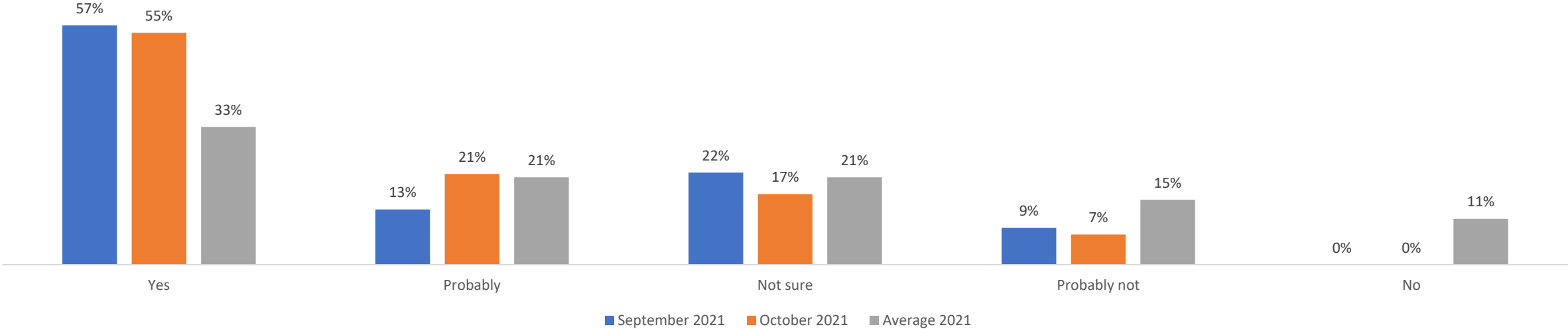
Q: Would your business survive for **three months** from now in the current situation? (41)



## Research Outputs – Business Survival

Three quarters (76%) are confident they will survive for six months in the current situation. Those ‘not sure’ about their survival after six months account for 17% of the sample. Unfortunately, 7% think they probably won’t survive after six months.

Survive for six months from now in the current situation



Q: Would your business survive for **six months** from now in the current situation? (41)

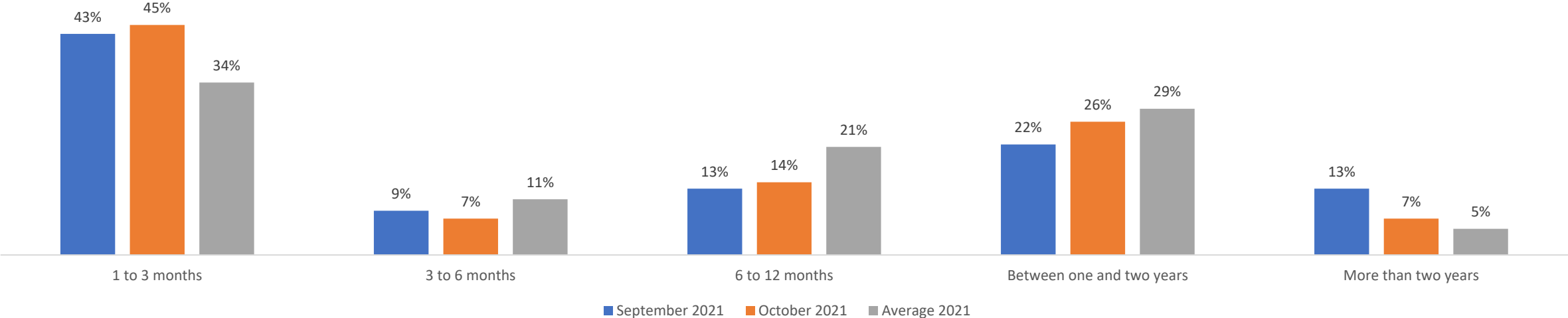


## Research Outputs – Business Recovery

Should trading restrictions linked to Covid-19 end today, just over two in five (45%) estimate that it would take their company up to 3 months to get back to business as usual and a further 9% will need up to 6 month.

A quarter (26%) are likely to need between one and two years to recover. On either side of that period, 14% expect to need between 6 months and a year to recover and a further 7% will need at least two years to get back to normal.

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

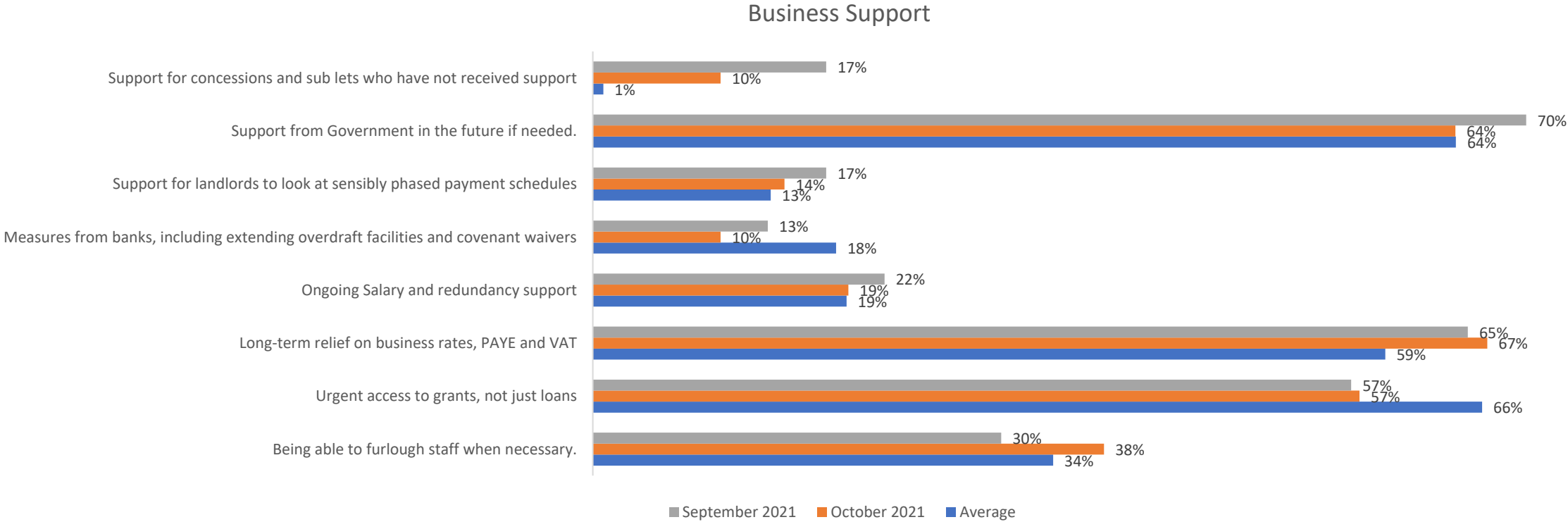


Q: If Covid 19 and all trading restrictions were to end today, how long would you estimate it would take for your company to get back to business as usual? (40)



## Research Outputs – Business Support

Overall, there's less the dependency on Government support to secure business continuity compared to the earlier months of the pandemic. However, large proportions of businesses are continuing to ask for long term relief on business rates, PAYE and VAT (67%). Two thirds (64%) requested support from Government in the future, if needed. And almost three in five (57%) are requesting urgent access to grants, not just loans.

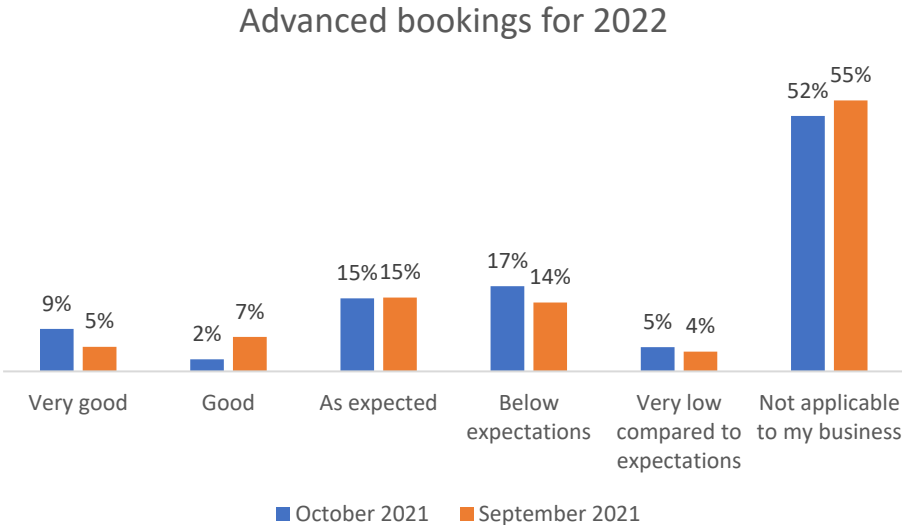
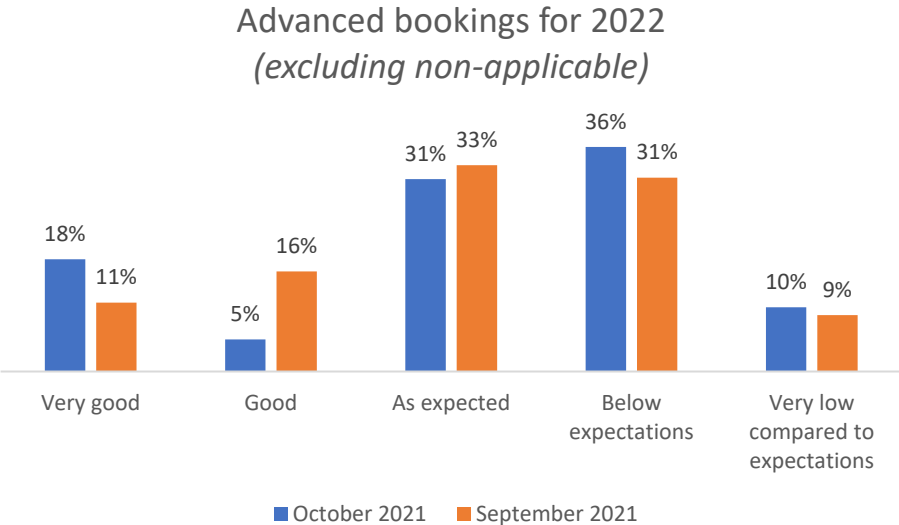


Q: What support from Government would be crucial for your business going forward? (41)



## Research Outputs – Advanced bookings for 2022

Just over half of respondents (52%) were unable to report on advanced bookings for 2022. When these businesses are removed from the calculations, the results show that just under a quarter (23%) report good (5%) or very good (18%) levels of advanced bookings. However, the majority report levels to be ‘as expected’ (31%) or ‘below expectations’ (36%). Those reporting ‘very low levels compared to expectations’ account for 10% of the sample.



Q: What are your advanced bookings for 2022 (if applicable) (42)





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