Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and Business Improvement Area

November 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 31 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:

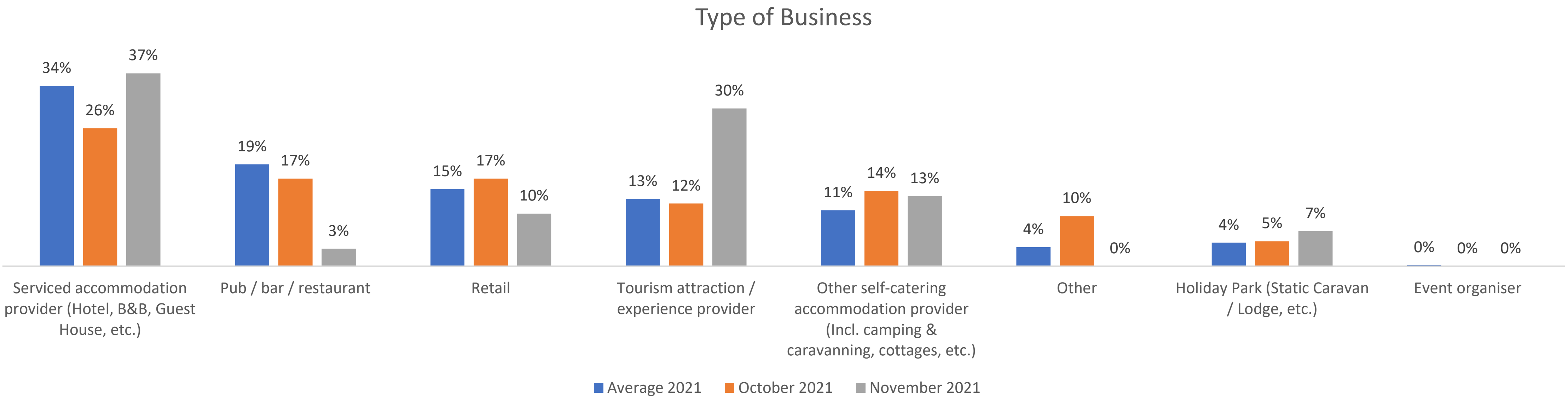
Latest updates for businesses affected by COVID-19

Omicron Update - New Measures being Introduced from 4:00am Tuesday 30 November

- All international arrivals must take a Day 2 PCR test and self-isolate until they receive a negative result.
- All contacts of suspected Omicron cases must self-isolate, regardless of their vaccination status. They will be contacted by NHS Test and Trace.
- Face coverings will be made compulsory in shops and on public transport from next week. All hospitality settings will be exempt.

Research Outputs – Business Profile

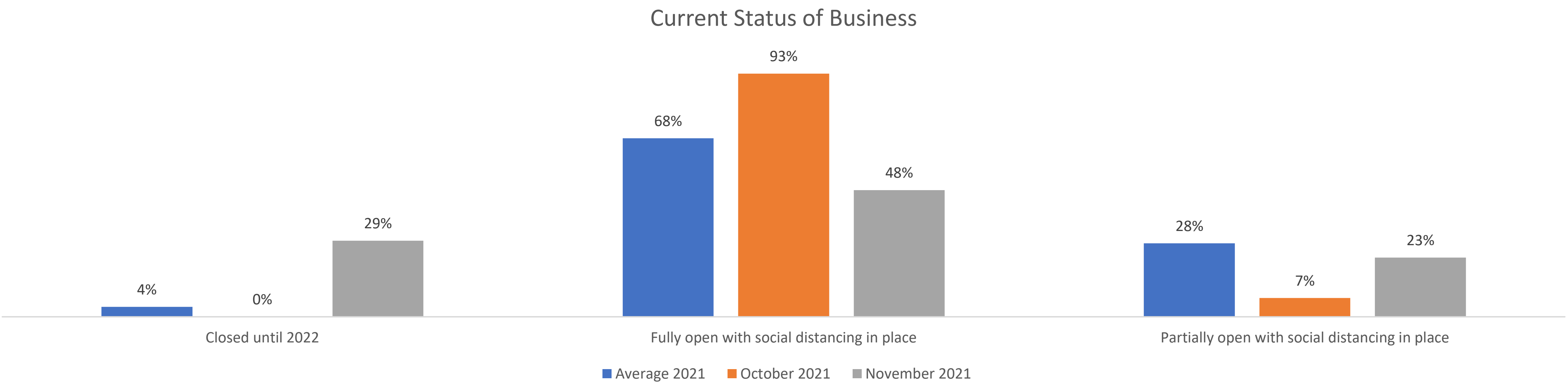
Just under three in five (57%) were accommodation providers. Of these, serviced accommodation businesses accounted for 37%. Non-service including campsites and cottages accounted for 20%. Tourist attractions accounted for 30%, with retail and catering (pubs, bars and restaurants) accounting for 13% each.



Q: What type of business do you run? (31)

Research Outputs – Current Status

Just under a third (29%) of all respondents were closed for business until 2022. About half (48%) were fully open with social distancing measures in place and 23% were partially open with social distancing measures in place.

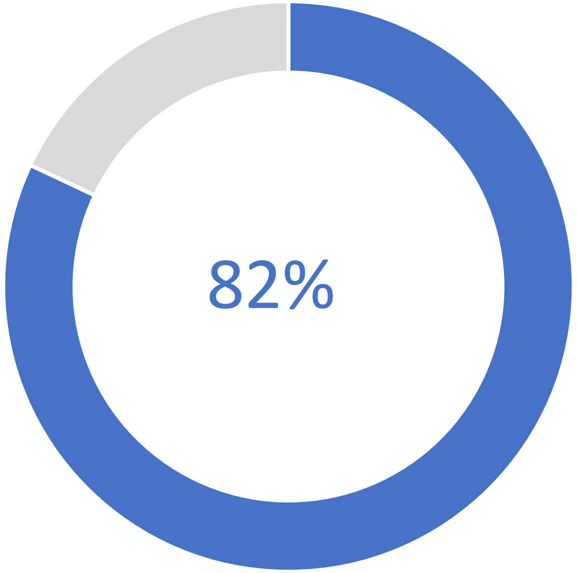


Q: What is the current status of your business? *(31)*

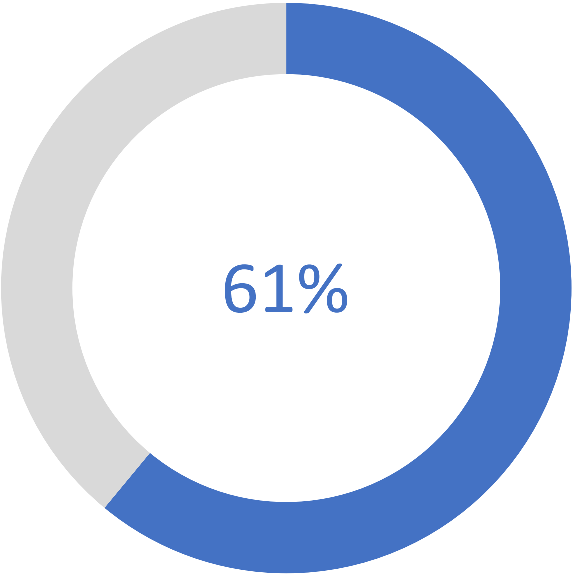
Research Outputs – Current Status

We noticed variations in trading levels since last month. Businesses were operating at 82% of their usual capacity (from 81% in October). However, their volume of trade during the week prior to completing the survey was 61% of the level achieved the same week the previous year, down significantly from 80% in October. Current staff levels accounted for 83% of the usual number of staff employed before the start of the pandemic (down from 93% in October).

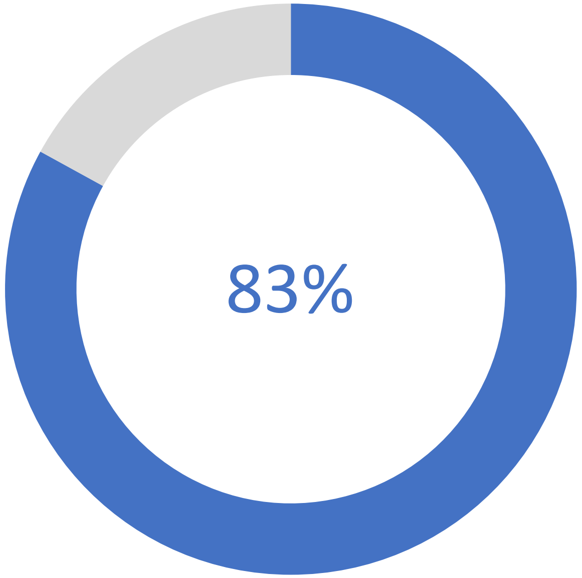
Percentage of usual capacity operating at



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? *(31)*
Q: What was your percentage of trade last week compared to the same week last year? *(31)*
Q: Approximately what percentage of your usual staffing levels are you operating at? *(31)*

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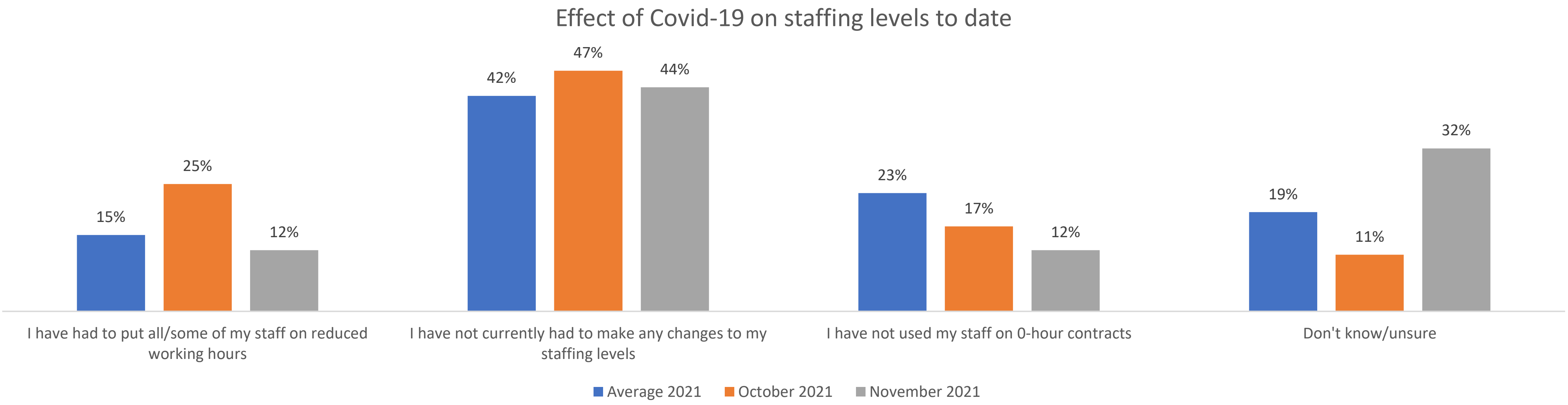
Research Outputs – Staff and employment changes

Just over two in five (44%) say they did not have to make any changes to their staff.

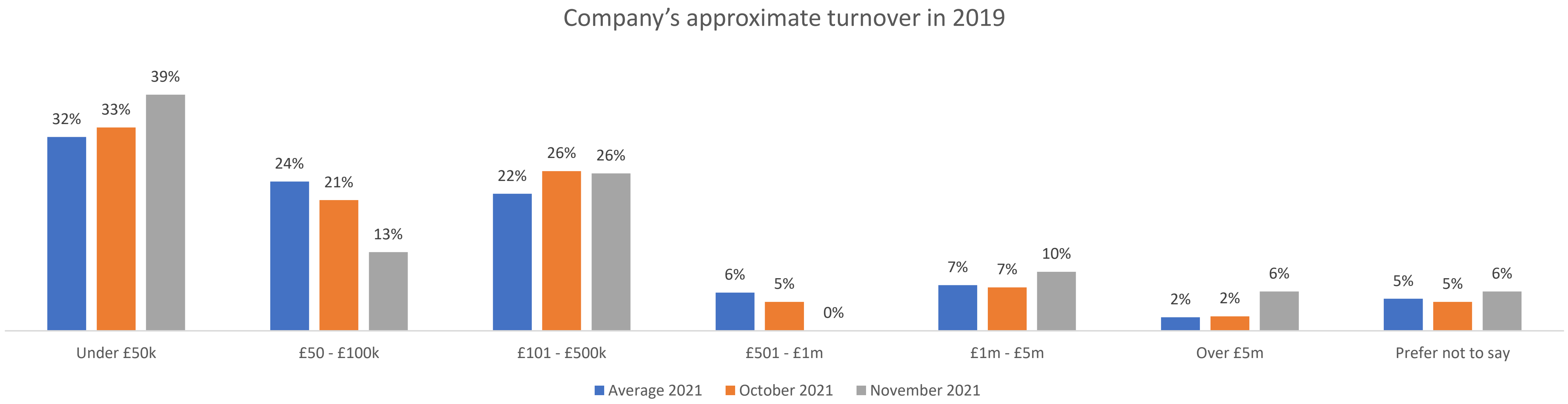
There was a slight decrease in the proportion of respondents saying they had not used their 0-hour contracts (12% up from 17% in October). The proportion of businesses that had to put all/some of their staff on reduced working hours halved since last month, at 12% (compared to 25% in October).



Q: What other effect has Covid-19 had on your staffing levels to date? *(31)*

Research Outputs – Impact on business turnover

Two in five (39%) achieved a turnover of under £50k and for a further 13% it was between £50k and £100k. Just over two in five (42%) achieved a turnover or over £100k. Of these, 26% made between £101k and £500k and the rest accounts for businesses with turnovers above £500k.

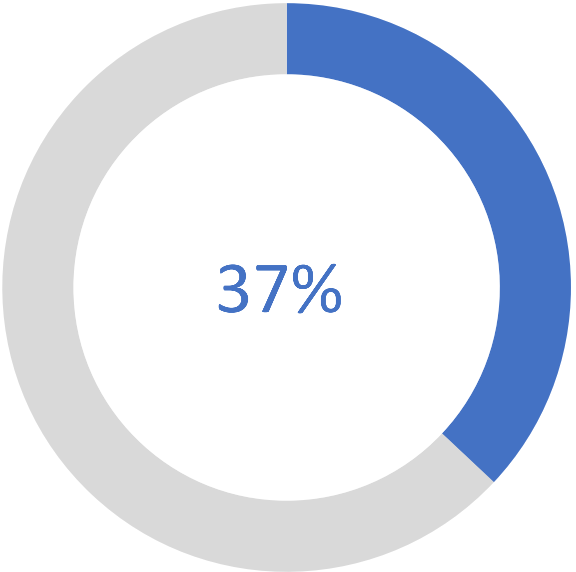


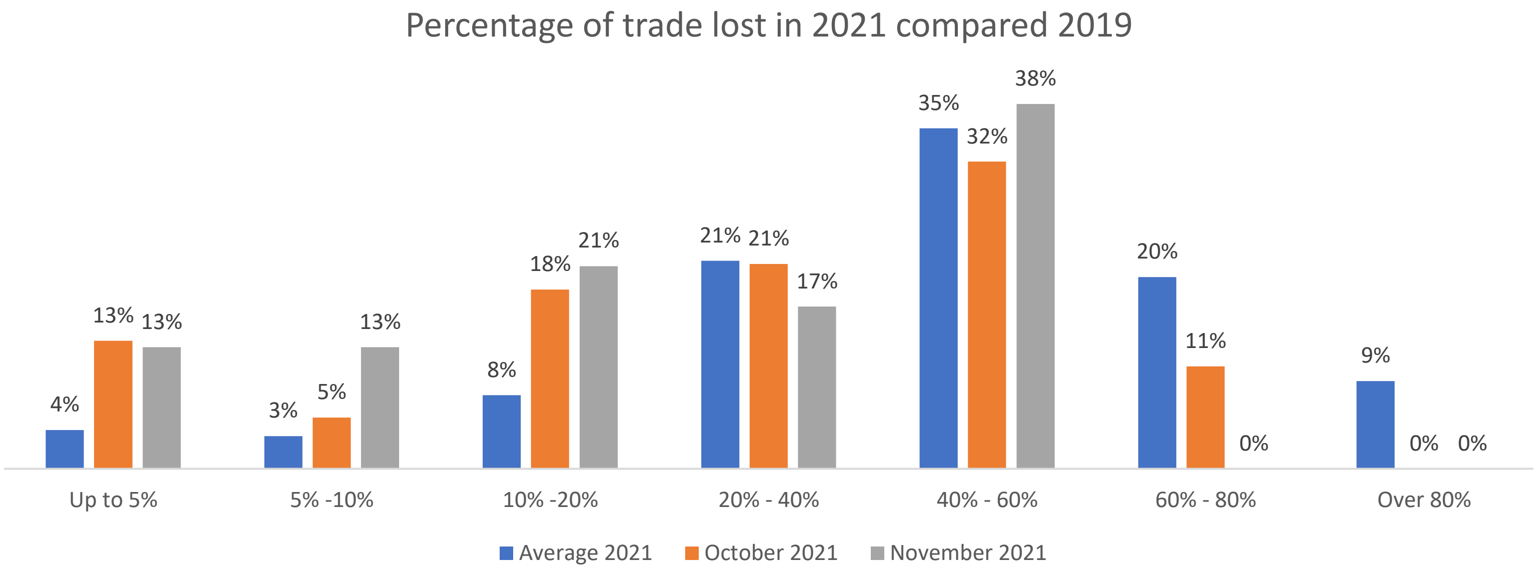
Q: What was your company's approximate turnover? *(31)*

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 half (47%) lost less than 20% of trade. One in six (17%) lost between 20% and 40% of turnover. A further 38% lost between 40% and 60%, when compared to 2019.

On average, businesses taking part in the survey saw a 37% loss in trade during 2021, compared 2019

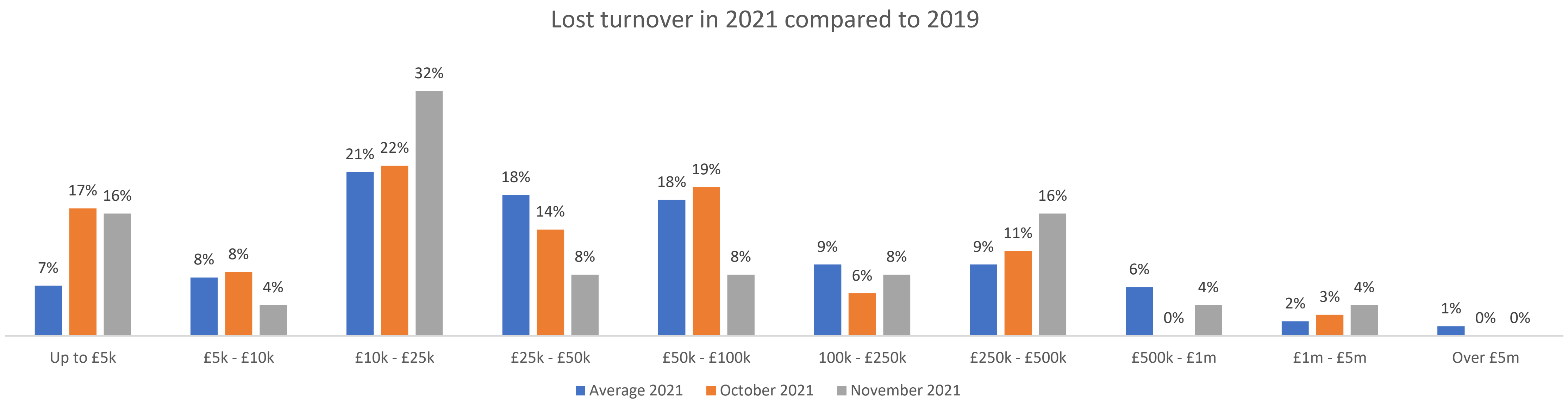




Q: If your trade has decreased what percentage of trade would you say you have lost in 2021 compared 2019? *(30)*

Research Outputs – Impact on business turnover

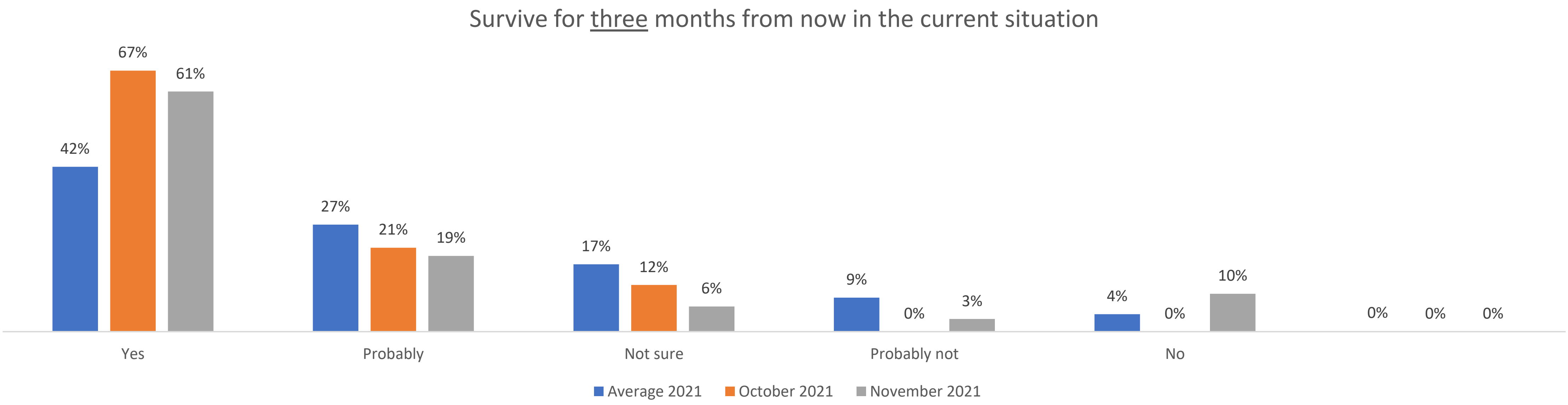
In most cases (60%), the loss of turnover in 2021 compared to 2019 was up to £50k. Of these, 52% lost up to £25k, with 16% losing up to £5k. Businesses reporting losses of between £50k and £100k accounted for 8% and a further 8% reported losses of between £100k and £250k. Note that a quarter (24%) of respondents reported losses above £250k.



Q: Approximately how much could this mean in terms of lost turnover in 2021 compared to 2019? *(31)*

Research Outputs – Business Survival

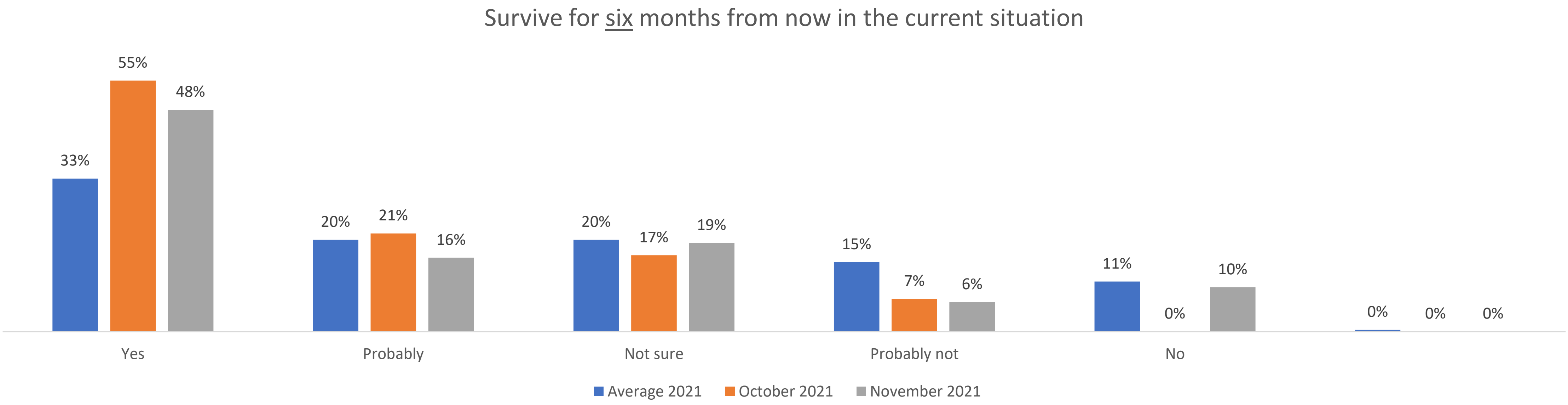
The majority respondents are expecting to survive the next three months. Four in five businesses (80%) have a positive outlook on their likelihood or surviving the next three months and 6% are still not sure. However, 13% are not sure their business will survive the winter.



Q: Would your business survive for **three months** from now in the current situation? *(31)*

Research Outputs – Business Survival

Just over half (54%) are confident they will survive for six month in the current situation. Those 'not sure' about their survival after six months account for 19% of the sample. Unfortunately, 16% think they probably won't survive after six months.

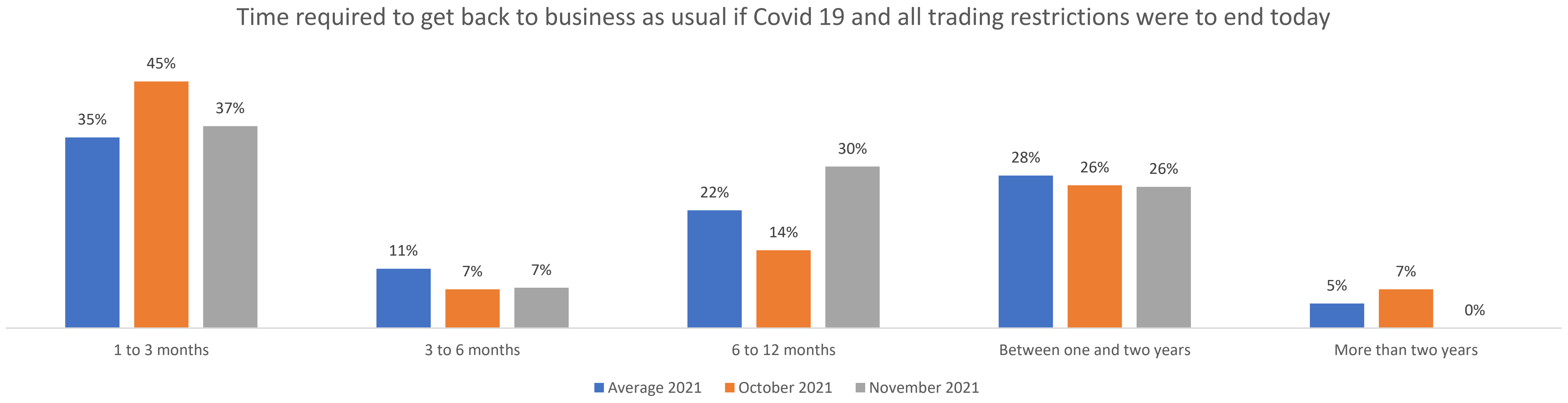


Q: Would your business survive for **six months** from now in the current situation? *(31)*

Research Outputs – Business Recovery

Should trading restrictions linked to Covid-19 end today, almost two in five (37%) estimate that it would take their company up to 3 months to get back to business as usual and a further 7% will need up to 6 month.

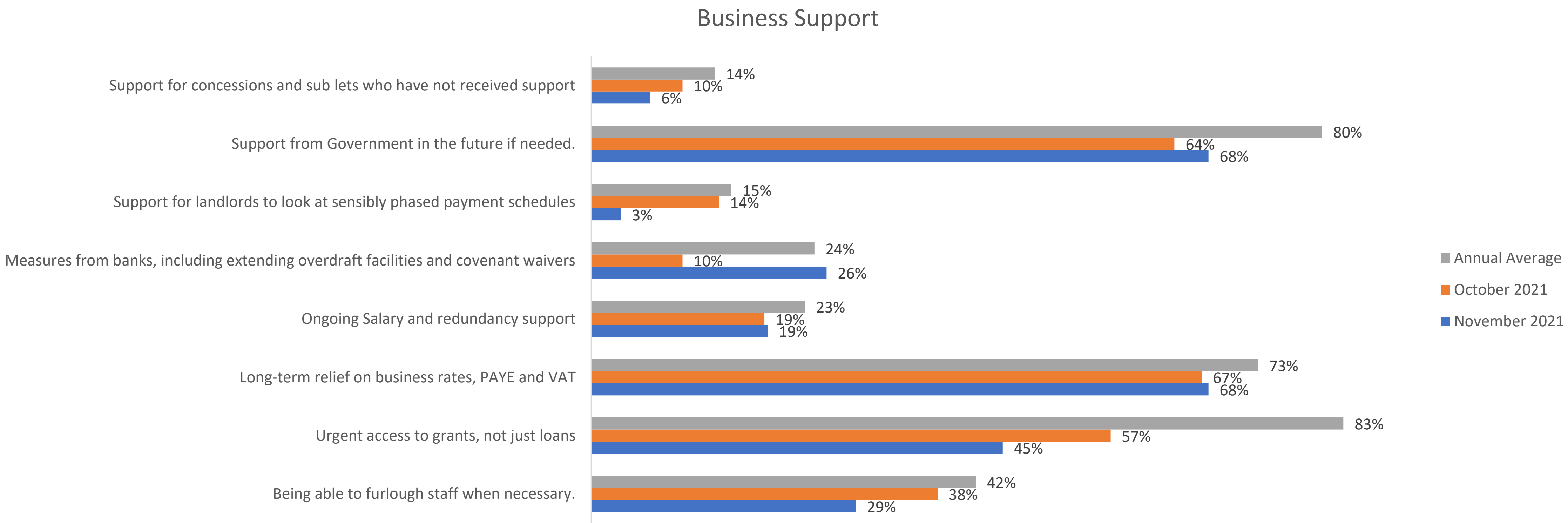
Three in ten (30%) expect to need between 6 moths and a year to recover, and a quarter (26%) are likely to need between one and two years to recover.



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? *(30)*

Research Outputs – Business Support

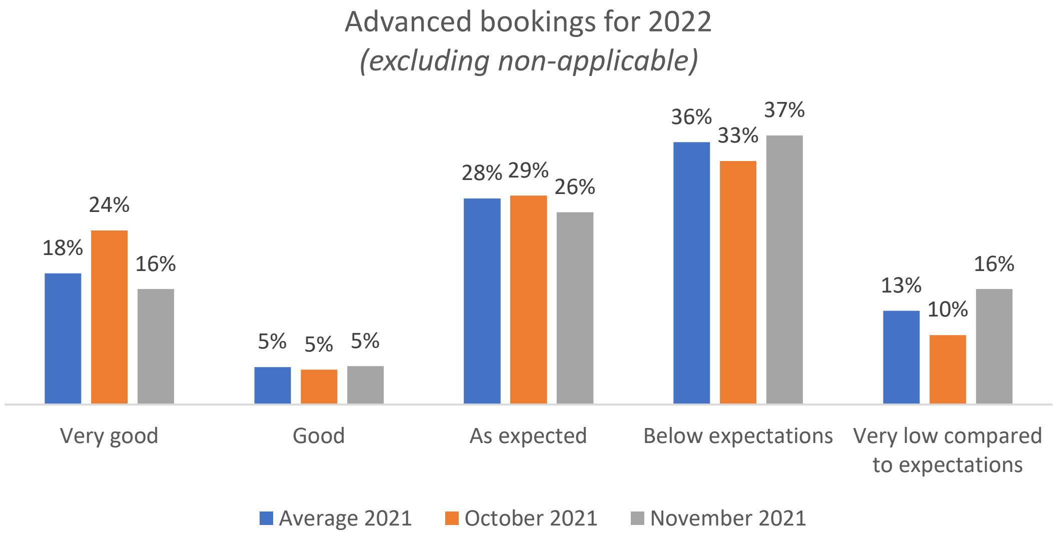
Large proportions of businesses are continuing to ask for long term relief on business rates, PAYE and VAT and support from Government in the future, if needed (68% each). Almost half (48%) are requesting urgent access to grants, not just loans.

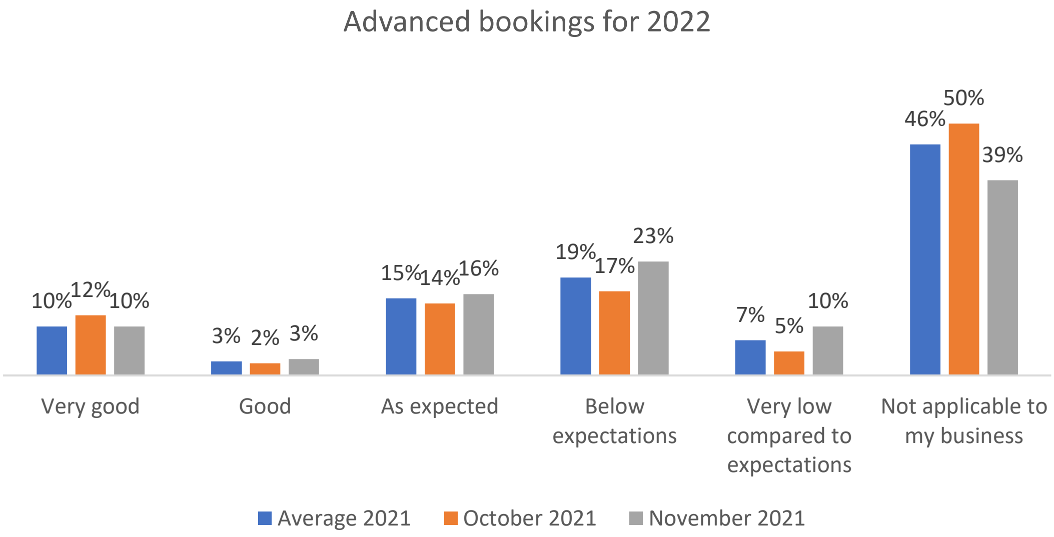


Q: What support from Government would be crucial for your business going forward? *(31)*

Research Outputs – Advanced bookings for 2022

Two in five respondents (39%) were unable to report on advanced bookings for 2022. When these businesses are removed from the calculations, the results show that one in five (21%) report good (5%) or very good (16%) levels of advanced bookings and a quarter (26%) report levels to be ‘as expected’ (26%). However, half (53%) feel their level of advance bookings are lower than expected for this time of the year, with 37% saying levels are ‘below expectations’ and 16% are reporting ‘very low levels compared to expectations’.





Q: What are your advanced bookings for 2022 (if applicable) *(31)*

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