

# Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and  
Business Improvement Area

Week 7: 1 May to 6 May

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 weekly 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

A weekly report will be produced reflecting 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 economic impact assessment of the COVID-19 on the local economy in the context of the latest Cambridge Model results. This report includes responses from 20 March to 9 April, 2020. The report includes a breakdown of responses by week as well as an average of all responses to date. The sample size is 689 responses (163 responses in week 1; 81 responses in week 2, 71 responses in week 3, 88 responses in week 4; 88 responses in week 5; 95 responses in week 6 and 103 responses in week 7).

### 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).



## Report for period between 1 May and 6 May 2020 - Key developments:

### **Monday 4 May**

A new Bounce Back Loans Scheme opens for applications and allows small business owners to apply to accredited lenders by filling out a simple online form, with only seven questions. Businesses able to borrow between £2,000 and £50,000 with the cash being made available within days.

### **Friday 1 May**

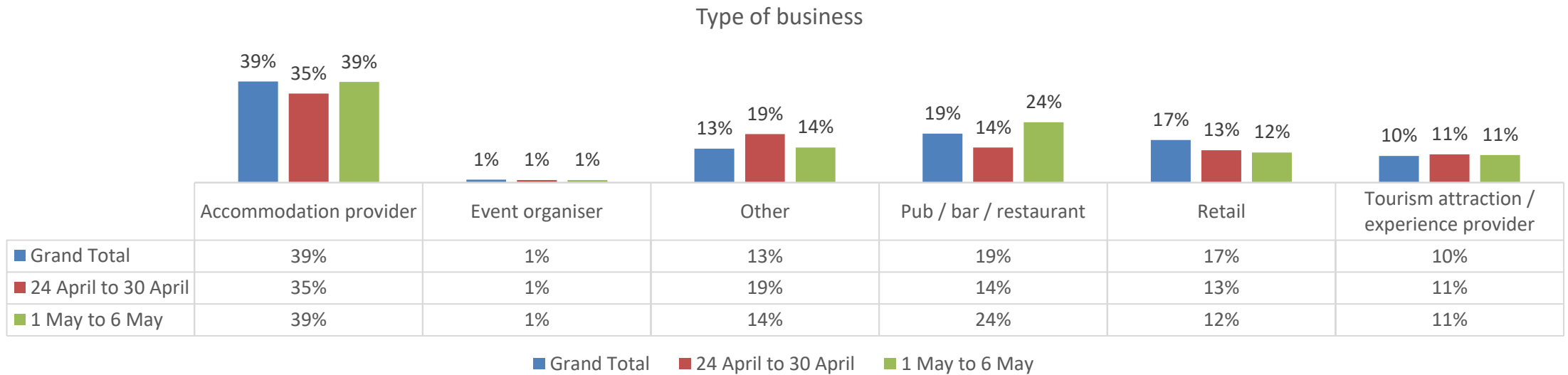
A discretionary fund has been set up to accommodate small businesses previously outside the scope of the business grant funds scheme with up to £617 million to be made available for local authorities in England.



## Research Outputs – Business Profile

During week 7 there was an increase in the number of accommodation providers taking part in the survey. The proportion of pubs / bars / restaurants, retail outlets and attractions increased significantly.

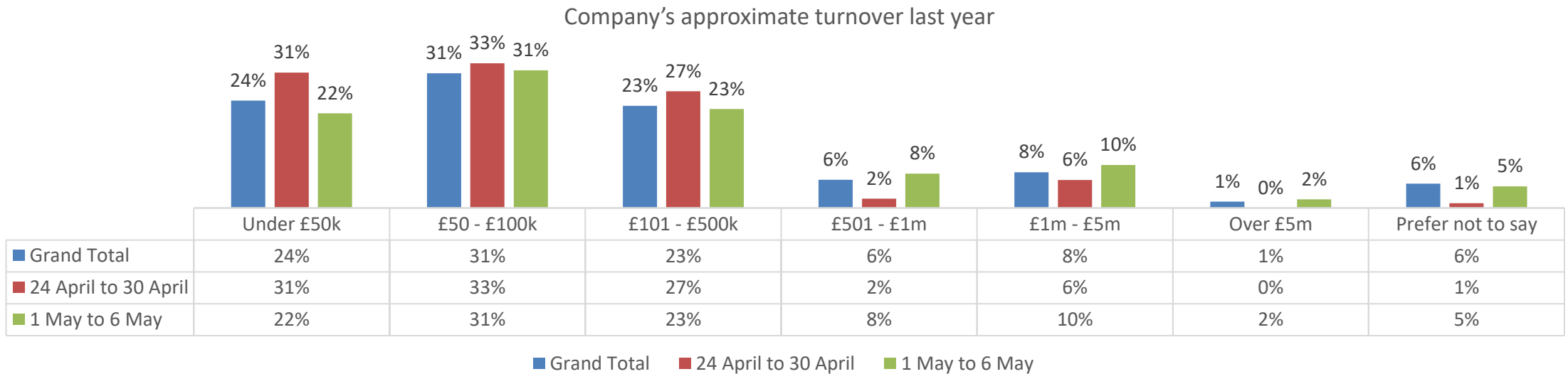
‘Other’ businesses include laundry services, estate agents, barbers / hair dressers and other types of food provision (fish and chip shop, Ice-cream parlours and food takeaways)



Q: What type of business do you run?

## Research Outputs – Business Profile

Businesses with turnover up to £100k make up just over half of the sample (53% combined). A further 23% are businesses with turnover of between £101k and £500k. Larger businesses, with turnover over £500k account for the remaining 20%, a significant increase on the 9% from the previous week. These results show an increase in the level of participation by SMEs since the start of the tracker survey six weeks ago.

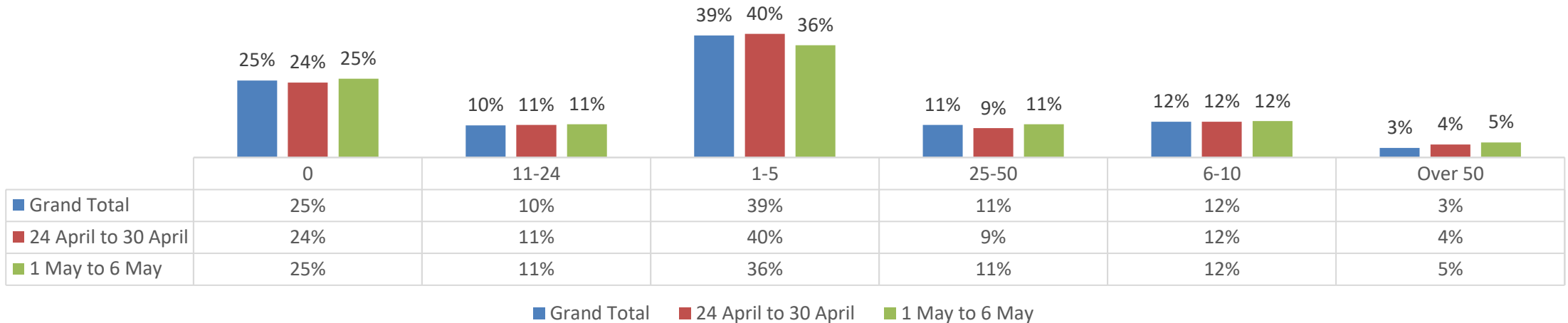


Q: What was your company's approximate turnover last year?

## Research Outputs – Staff and employment changes

We report very little week-on-week changes in the number of staff employed prior to Covid-19. During week 7 there has been a decrease in the proportion of businesses employing between 1 and 5 members of staff (36% from 40% in week 6) with all the other groups showing marginal changes week-on-week.

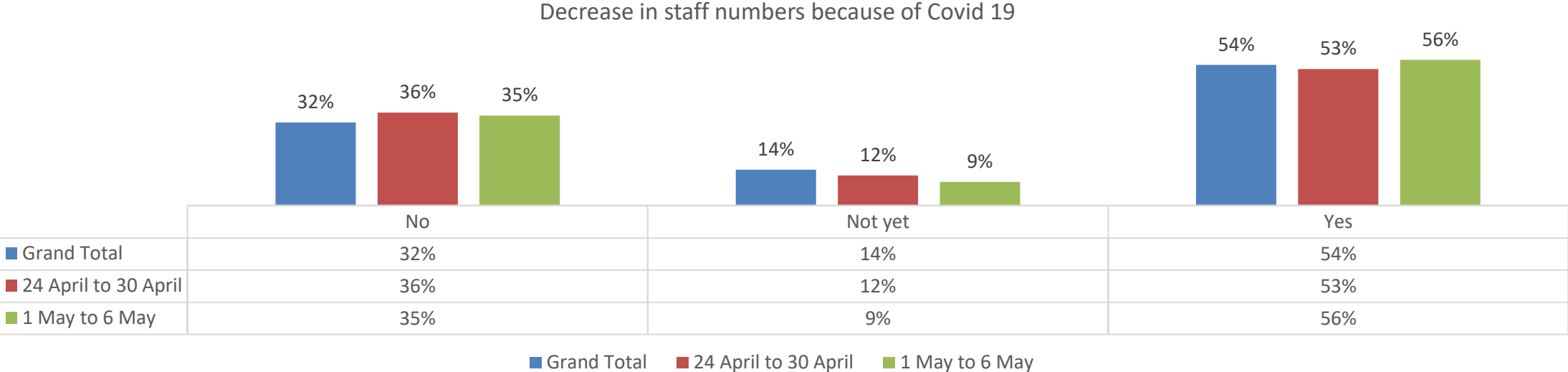
Staff employed or expected to employ before Covid 19



Q: How many staff did you employ or expected to employ before the start of the Covid 19 crisis?

## Research Outputs – Staff and employment changes

Again, very little week-on-week changes in the proportion of businesses decreasing their staff numbers. This week there was a three point increase since week 6 (56% form 53%). Similarly, the proportion that are planning to do it soon has also decreased, with 9% saying they have not decreased their staff ‘yet’ (compared to 12% in week 6).



Q: Have you had to decrease you staff because of Covid 19?

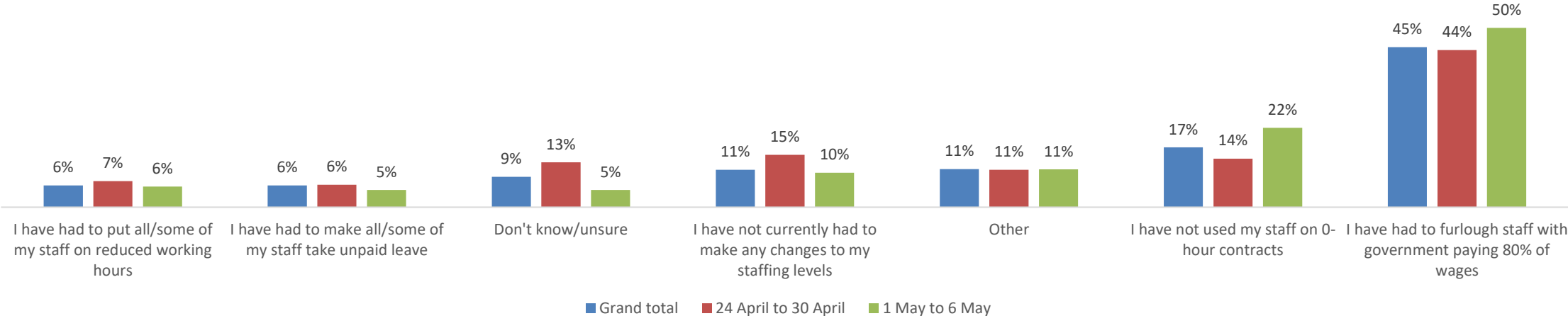


## Research Outputs – Staff and employment changes

Half (50%) said they had had to furlough staff with government paying 80% of wages, up from 44% in week 6. There was an increase in the proportion that said they had not used their staff on 0-hour contracts (22% up from 14% in week 6).

Businesses that have not currently had to make any changes to their staffing levels has decreased to 10% from 15% in week 6.

Other effect of Covid-19 on staffing levels



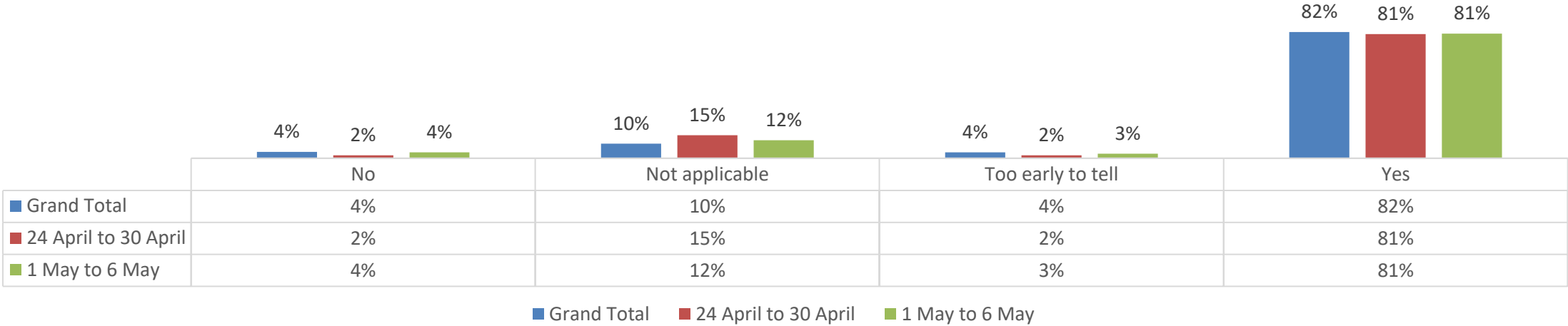
Q: What other effect has Covid-19 had on your staffing levels to date?



## Research Outputs – Impact on bookings and turnover

The proportion of businesses that reported changes to existing bookings/sales because of Covid 19 was relatively unchanged since last week. The results show that this proportion was 81% in week 7, unchanged since last week and one percent point down compared to the average for the 7 weeks. .

Changes to existing bookings/sales because of Covid 19

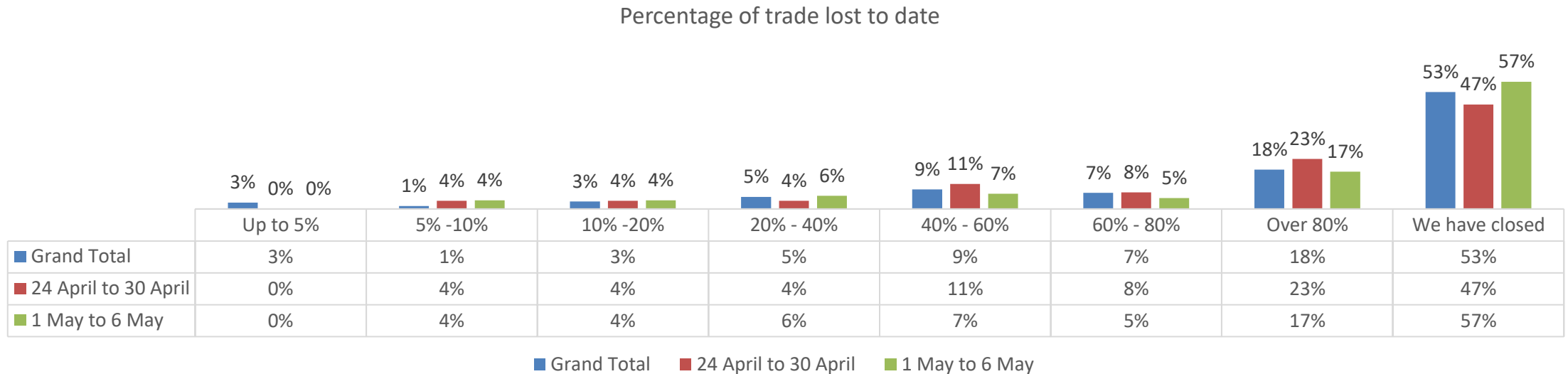


Q: Have there been any changes to existing bookings/sales because of Covid 19?  
Changes to dates or other details but not outright cancellations of bookings



## Research Outputs – Impact on bookings and turnover

Covid-19 is having significant impacts on the local tourism industry. Just over half of businesses are reporting closures (57% this week compared 47% in week 6). It should be taken into account that the UK Government forced accommodation providers and other tourism and leisure related businesses to temporarily close their doors. The continued drop in the proportion of businesses that report closures may be influenced by the fact that some businesses have been closed for a number of weeks now and may have decided not to take part in the tracker survey anymore.

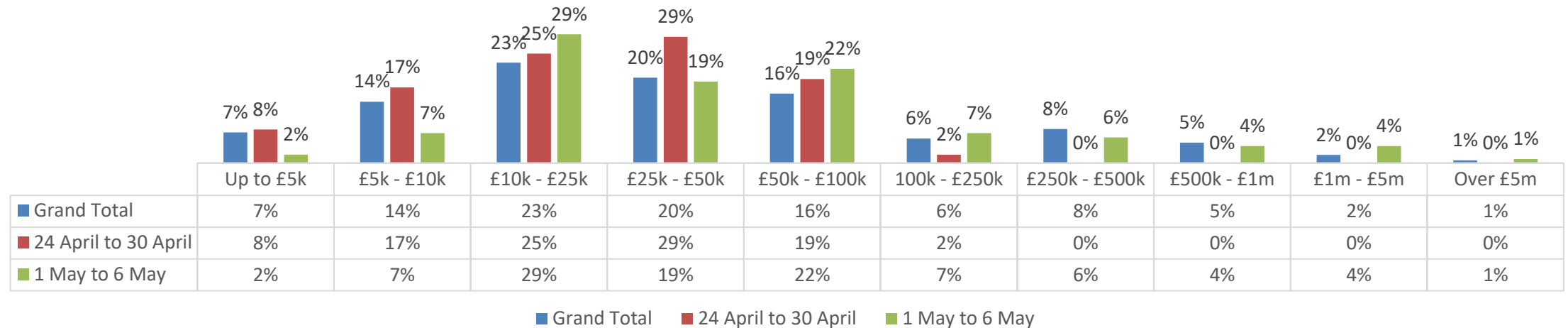


Q: If your trade has decreased what percentage of trade would you say you have lost to date?

## Research Outputs – Impact on bookings and turnover

The proportion of participants reporting losses of between £10k and £25k has increased to 29% from 25% the previous week. Furthermore, those reporting losses of between £50k and £100k account for a further 22% of all businesses talking part in the survey. Again, these results highlight the significant impacts that Covid-19 is having on the local tourism industry.

How much could this mean in terms of lost turnover?

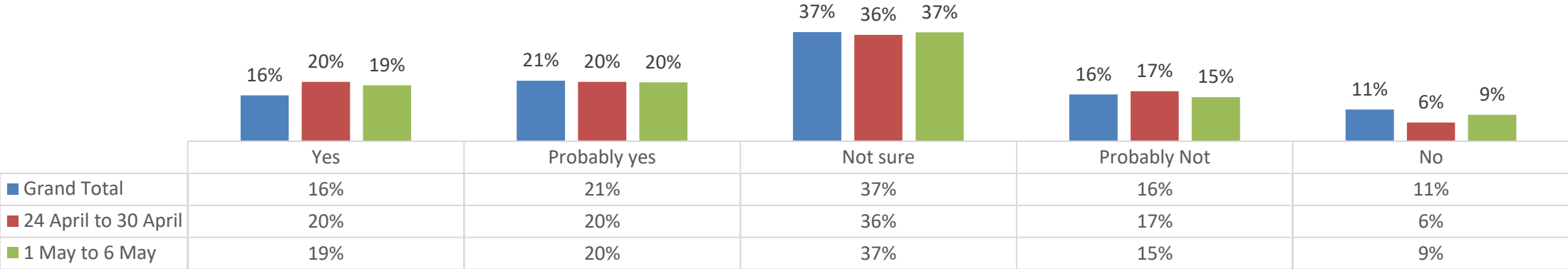


Q: Approximately how much could this mean in terms of lost turnover?

## Research Outputs – Business Survival

Very limited change week-on-week in the likelihood of surviving for three months in the current situation. A slight increase in the proportion that said they won't probably survive the next three months.

Business survival after THREE months in the current situation?



■ Grand Total ■ 24 April to 30 April ■ 1 May to 6 May



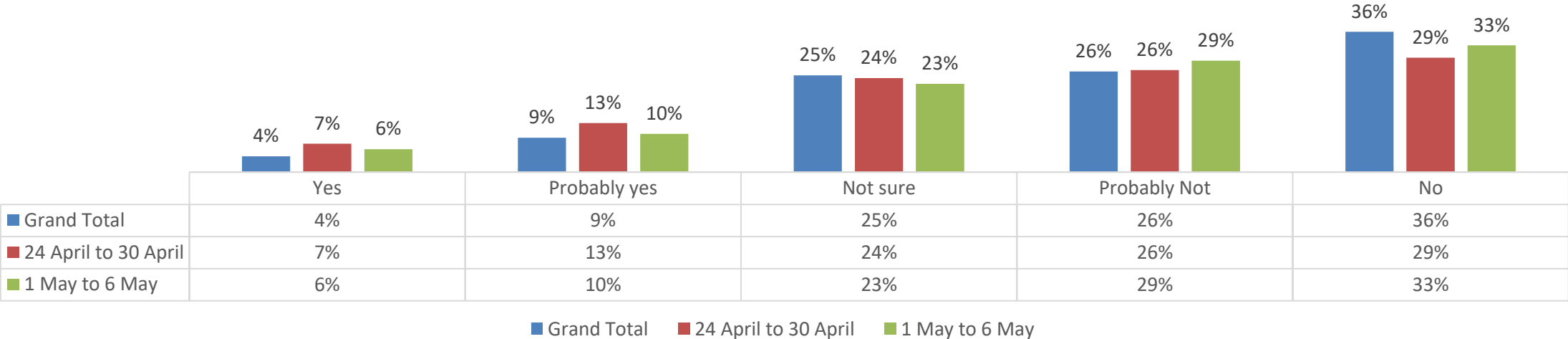
Q: Would your business survive for three months in the current situation?



## Research Outputs – Business Survival

Similarly, there’s a slight increase in the proportion predicting that their business probably won’t survive for SIX months in the current situation (62% said ‘no’ or ‘probably not’ in week 7, compared to 55% in week 6) with more weighting given to the outright ‘no’ (33% compared to 29% in week 6).

Business survival after SIX months in the current situation?



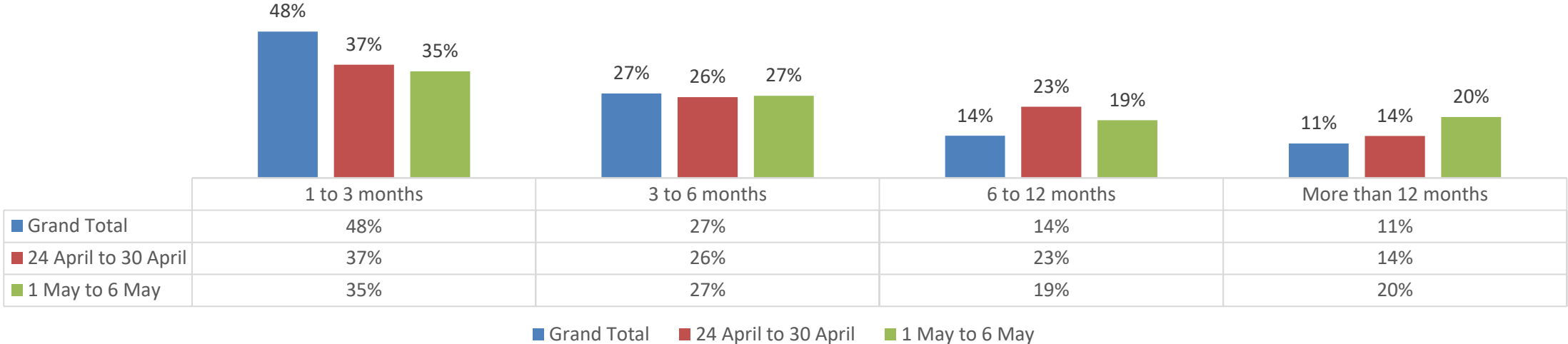
Q: Would your business survive for six months in the current situation?



## Research Outputs – Business Recovery

This weeks results build on the marked change in the perception as to how long it will take to get back to business as usual. Just over a third (35%) believe that if Covid 19 were to end today, it would take them between 1 and 3 months to get back to business as usual. However, 19% expect recovery to take up to 12 months and a further 20% believe it will take more than 12 months to fully recover. Overall, there appears to be an increasing feeling that recovery will not take place until the 2021 season.

If Covid 19 were to end today, how long before your get back to business as usual?



Q: Finally, If Covid 19 were to end today, how long would you estimate it would take for your company to get back to business as usual?

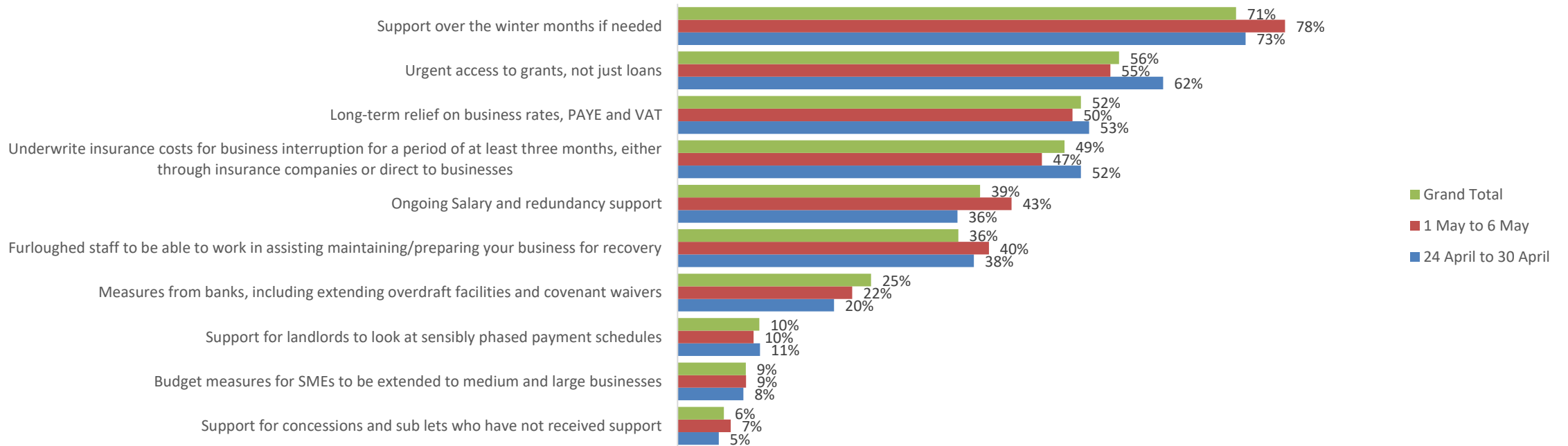


## Research Outputs – Business Support

Following on from the previous chart, increasing numbers of businesses (78%) are starting to think about needing support from government over the winter months. There was also a decrease of seven percentage points (55% from 62% in week 6) in the proportion needing urgent access to grants, not just loans.

The other significant change since week 6 is the continued increase in the proportion asking for more flexibility with furloughed staff by allowing them to work in assisting with business recovery tasks.

Support from Government going forward



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

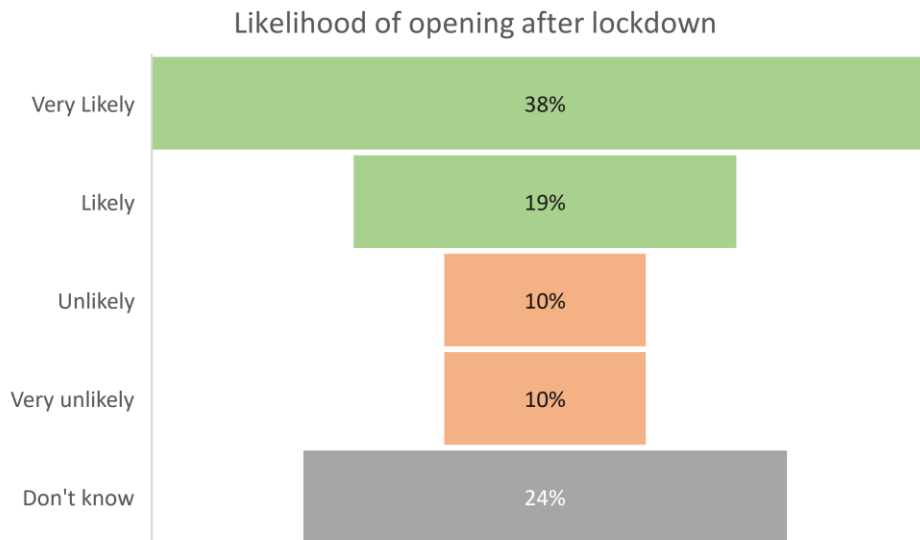


## Research Outputs – Business after lockdown

Following on from

“It would considerably reduce normal turnover due to the restrictions we would have to apply, staffing levels would be cut by approx. 50% but at least we would have some income/profit.

The hotel would open first followed by the bars and restaurants when allowed.”



“If we were to open under social distancing we would only allow a limited number of guests to stay at our guest house at any time.

This as well as vetting each person that arrives.

We have tried to purchase thermometers but without success which we would require to open.

There should be a government scheme to provide this to business such as ours.”

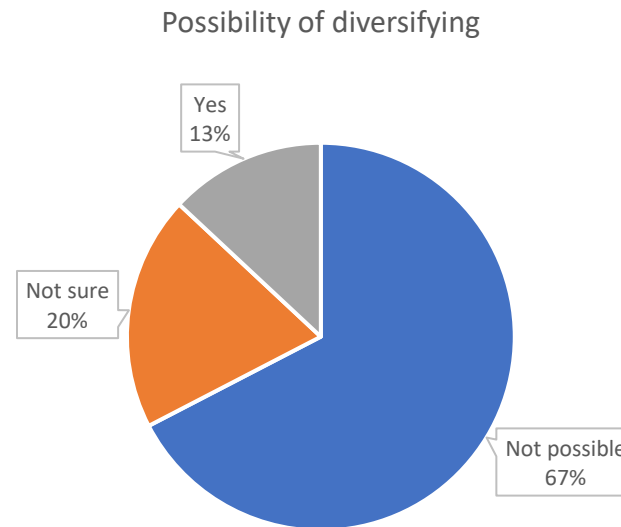


*Q: How likely are you to open your business, if the Government removes the lockdown, but keeps social distancing and safety measures still in place. Q: Please could you explain the reasons as to why you would or would not open?*



## Research Outputs – Further opinions

Two thirds believe it would not be possible for them to diversify and a further 20%. Only 13% said diversifying their offer was an option and some suggested applying for alcohol licence or offering takeaway food as potential actions in the short term.



Q: *Is it possible for your business to diversify to create trade this year?*

## Research Outputs – Further opinions

At the end of the survey businesses were asked if they had any other comments they would like to raise. This week the survey asked businesses to specify about major challenges short term and long term. A summary of comments / key themes is below:

### Shorter term

Making up for lost revenue

Questions over whether guests will still want to holiday / used their caravans, etc., with reduced services available.

Questions over whether guests will expect reduced charges as a result or reduced services.

Should I buy stock in the near future for when lockdown comes to an end?

Many suggest they would need to weigh potential income generation against costs of reopening as reduced footfall may mean operating at a loss

### Long term

Just getting people through the door - Biggest challenge is reopening with our hands tied, forced reduction in income and custom due to social distancing measures.

Managing over the 20/21 winter without the financial reserves in place.

Readjusting 5-year business plan as a result of COVID-19.

The loss of income and trade will result in a significant step backwards for our long term plans of development and improvements.



*Q: Do you have any other comments you would like to raise? We are particularly interested in your major challenges short term and longer term?*



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