Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and Business Improvement Area

Week 12: 16 June to 22 June

Prepared by:

destinationresearch
delivering results : measuring what matters

On behalf of:

GREATER Yarmouth
TOURISM & BUSINESS IMPROVEMENT AREA

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 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 GYTBIA.

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 11 April to 18 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 933 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; 103 responses in week 7, 73 responses in week 8; 96 in week 99, 76 in week 10, 74 in week 11 and 76 in week 12.

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 16 June and 22 June 2020 - Key developments:

Sector-Specific Guidance
No further news on sector specific guidance in England - timeline, procedures or accreditation scheme for tourism businesses.

Scottish Guidance Released
New details for Scotland have been published including guidance for the tourism and hospitality sector, including procedures for staff and customer safety and an operations checklist.

Welsh Guidance Released
Welsh Assembly will announce on 9 July that at accommodation without shared facilities will be able to open on 13 July.

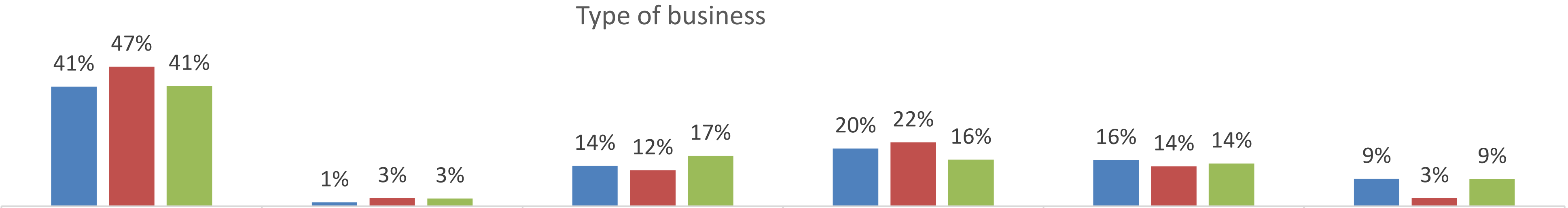
New guidance for Job Retention Scheme (CJRS)
Revised guidance has been published giving more detail on forthcoming changes to the Coronavirus Job Retention Scheme (CJRS) following the Chancellor's announcement last month.

Self-Employment Income Support Scheme (SEISS)
Updated guidance is available on the extension of the Self-Employment Income Support Scheme (SEISS). Eligible individuals are able to claim a second and final grant in August.

Updated guidance for holiday accommodation providers on accommodating those arriving into the UK
Businesses providing holiday accommodation can provide rooms to those required to self-isolate because they have arrived in England from outside the UK, or arrived in England from elsewhere in the UK but have within the preceding 14 days been outside the UK

Research Outputs – Business Profile

During week 12 there was an decrease in the number of accommodation providers and pubs / bar / restaurants and an increase in the proportion of tourism attractions taking part in the survey. The proportion of businesses under 'other' category increased to 17% of the sample, above the overall average for the 12 week period.



	Accommodation provider	Event organiser	Other	Pub / bar / restaurant	Retail	Tourism attraction / experience provider
Grand Total	41%	1%	14%	20%	16%	9%
9 June to 15 June	47%	3%	12%	22%	14%	3%
16 June to 22 June	41%	3%	17%	16%	14%	9%

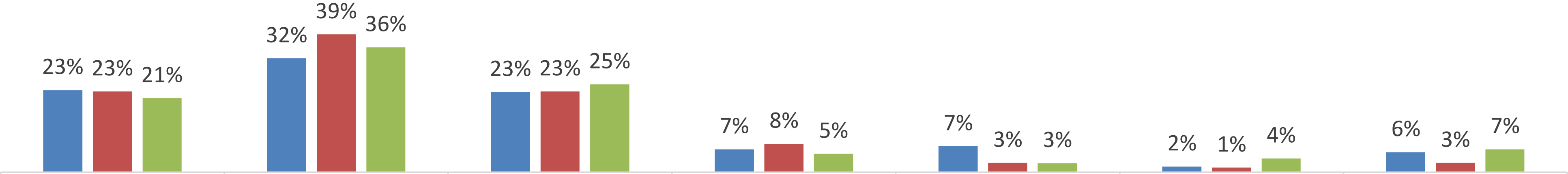
Grand Total 9 June to 15 June 16 June to 22 June

Q: What type of business do you run? (76)

Research Outputs – Business Profile

Businesses with turnover up to £100k account for almost three in five businesses included in the sample (57% combined), combined with an increase in the £101k - £500k bracket compared to previous weeks. Larger businesses, with turnover over £500k account for the remaining 12%. Overall, 83% of all responses have been from SMEs (turnover up to £500k).

Company's approximate turnover last year



	Under £50k	£50 - £100k	£101 - £500k	£501 - £1m	£1m - £5m	Over £5m	Prefer not to say
Grand Total	23%	32%	23%	7%	7%	2%	6%
9 June to 15 June	23%	39%	23%	8%	3%	1%	3%
16 June to 22 June	21%	36%	25%	5%	3%	4%	7%

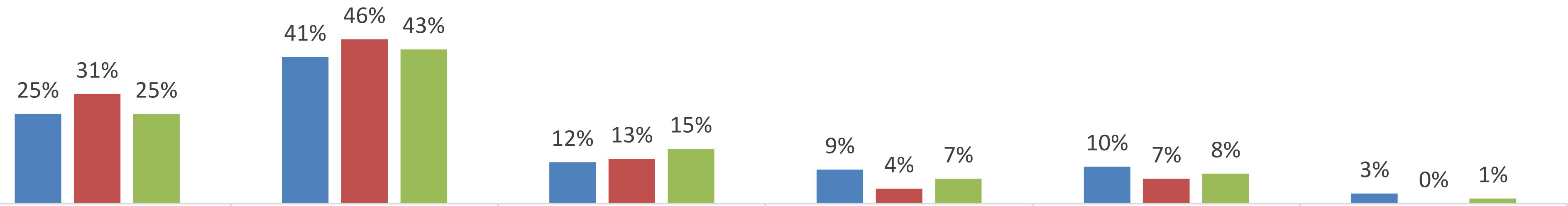
Grand Total 9 June to 15 June 16 June to 22 June

Q: What was your company's approximate turnover last year? (72)

Research Outputs – Staff and employment changes

A few changes is the size of businesses taking part in the survey. There was an decrease in the proportion of businesses with zero staff (25% down from 31% last week) and respondents employing between 1 and 5 -down three points. All other groups employing at least 6 members of staff were up on last week.

Staff employed or expected to employ before Covid 19



	0	1-5	6-10	11-24	25-50	Over 50
Grand Total	25%	41%	12%	9%	10%	3%
9 June to 15 June	31%	46%	13%	4%	7%	0%
16 June to 22 June	25%	43%	15%	7%	8%	1%

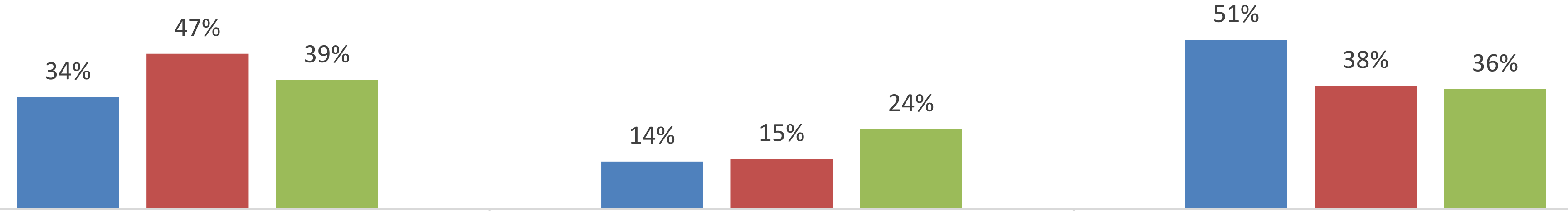
Grand Total   9 June to 15 June   16 June to 22 June

Q: How many staff did you employ or expected to employ before the start of the Covid 19 crisis? (74)

Research Outputs – Staff and employment changes

Two in five (39%) said they have not decreased their staff numbers due to Covid-19. About a third (36%) have reduced staff numbers and a quarter (24%) said 'not yet'. This could be interpreted as implying that they have not done so but might reduce numbers in the future.

Decrease in staff numbers because of Covid 19



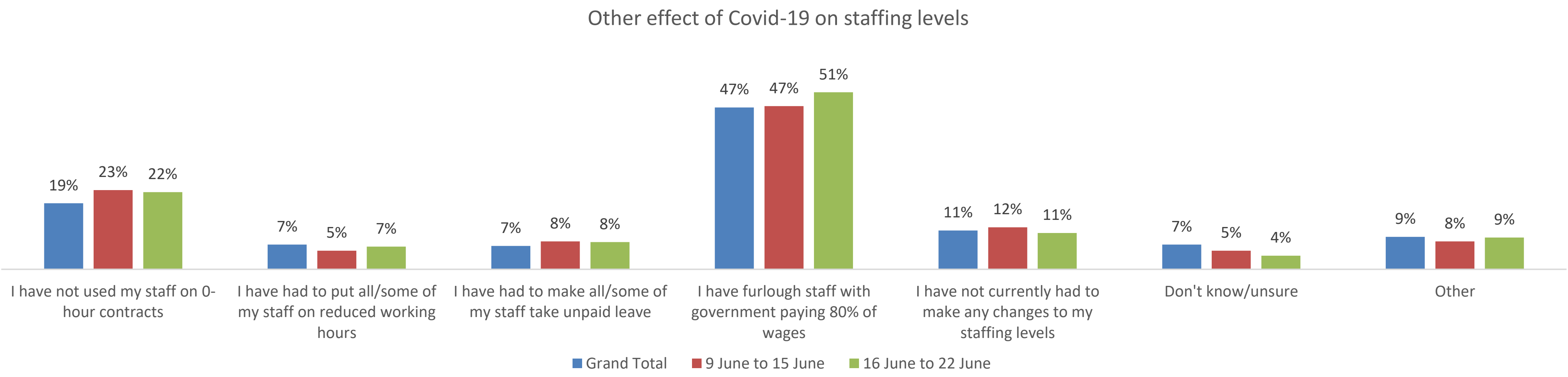
	No	Not yet	Yes
Grand Total	34%	14%	51%
9 June to 15 June	47%	15%	38%
16 June to 22 June	39%	24%	36%

Grand Total 9 June to 15 June 16 June to 22 June

Q: Have you had to decrease you staff because of Covid 19? (76)

Research Outputs – Staff and employment changes

Very small changes in terms of other staffing levels. Just over half (51%) said they had had to furlough staff with government paying 80% of wages, four points up on last week and also compared to the 11-week series average.

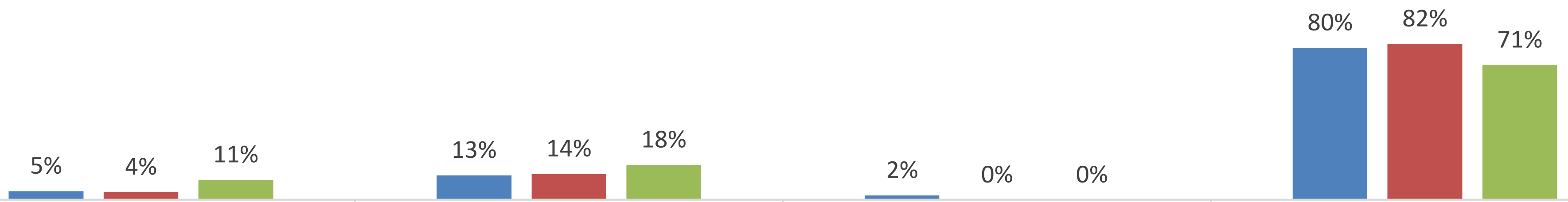


Q: What other effect has Covid-19 had on your staffing levels to date? (76)

Research Outputs – Impact on bookings and turnover

The proportion of businesses that reported changes to existing bookings/sales because of Covid 19 may be starting to decrease. Note that there's a significant and growing group that deem the question not applicable to their business model.

Changes to existing bookings/sales because of Covid 19



	No	Not applicable	Too early to tell	Yes
Grand Total	5%	13%	2%	80%
9 June to 15 June	4%	14%	0%	82%
16 June to 22 June	11%	18%	0%	71%

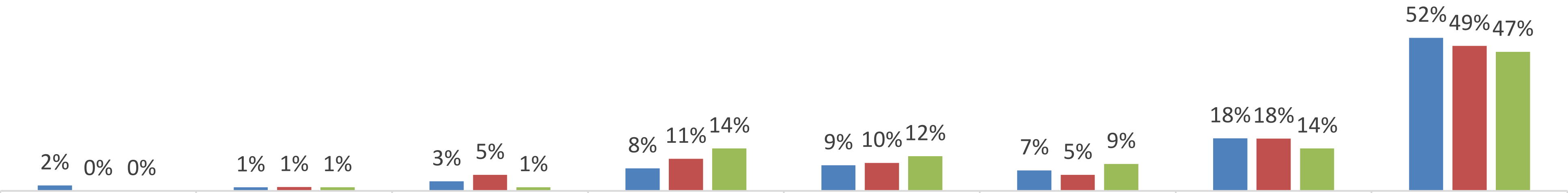
Grand Total 9 June to 15 June 16 June to 22 June

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 (76)

Research Outputs – Impact on bookings and turnover

Covid-19 is having significant impacts on the local tourism industry. Just under half of businesses are reporting temporary closures although the proportion is lower than in previous weeks (47% this week compared to 49% in week 11 52% for the 12-week average). 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 but many are now starting to open – again following Government policy.

Percentage of trade lost to date



	Up to 5%	5% -10%	10% -20%	20% - 40%	40% - 60%	60% - 80%	Over 80%	We have closed
Grand Total	2%	1%	3%	8%	9%	7%	18%	52%
9 June to 15 June	0%	1%	5%	11%	10%	5%	18%	49%
16 June to 22 June	0%	1%	1%	14%	12%	9%	14%	47%

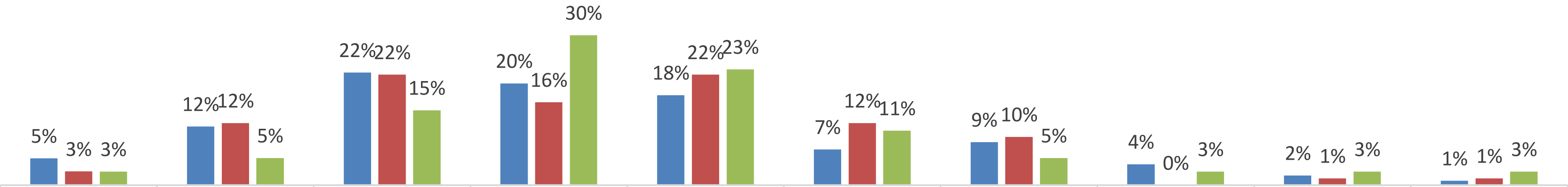
Grand Total   9 June to 15 June   16 June to 22 June

Q: If your trade has decreased what percentage of trade would you say you have lost to date? (76)

Research Outputs – Impact on bookings and turnover

Looking at the differences between this week's results and the 12-week period we notice an decrease in the proportion of businesses reporting losses up to £25k. When comparing this week's results to the overall average we notice a sharp increase in the proportion of businesses claiming turnover of between £25k and £50k.

How much could this mean in terms of lost turnover?



	Up to £5k	£5k - £10k	£10k - £25k	£25k - £50k	£50k - £100k	100k - £250k	£250k - £500k	£500k - £1m	£1m - £5m	Over £5m
Grand Total	5%	12%	22%	20%	18%	7%	9%	4%	2%	1%
9 June to 15 June	3%	12%	22%	16%	22%	12%	10%	0%	1%	1%
16 June to 22 June	3%	5%	15%	30%	23%	11%	5%	3%	3%	3%

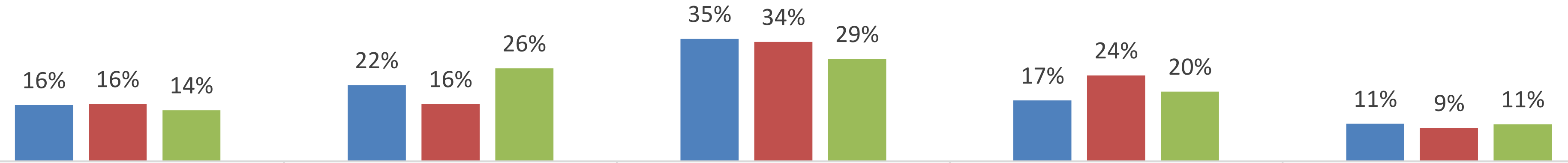
Grand Total · 9 June to 15 June · 16 June to 22 June

Q: Approximately how much could this mean in terms of lost turnover? (74)

Research Outputs – Business Survival

Two in five businesses have a positive outlook on their likelihood or surviving the next three months. However, a third don't expect to survive longer than three months and 19% are still not sure.

Business survival after THREE months in the current situation?



	Yes	Probably Yes	Not Sure	Probably Not	No
Grand Total	16%	22%	35%	17%	11%
9 June to 15 June	16%	16%	34%	24%	9%
16 June to 22 June	14%	26%	29%	20%	11%

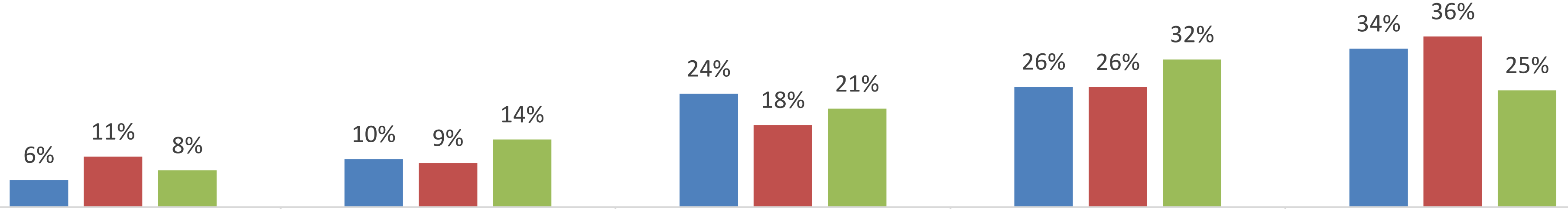
Grand Total ■ 9 June to 15 June ■ 16 June to 22 June

Q: Would your business survive for three months in the current situation? (76)

Research Outputs – Business Survival

Those ‘not sure’ about their survival after six months account for 21% of the sample and two in five (22%) are confident they will survive for six month in the current situation. Almost three in five (57%) think they probably won’t survive after six months, although only 25% said no with certainty, compared to 34% average for the twelve-week period.

Business survival after SIX months in the current situation?



	Yes	Probably Yes	Not Sure	Probably Not	No
Grand Total	6%	10%	24%	26%	34%
9 June to 15 June	11%	9%	18%	26%	36%
16 June to 22 June	8%	14%	21%	32%	25%

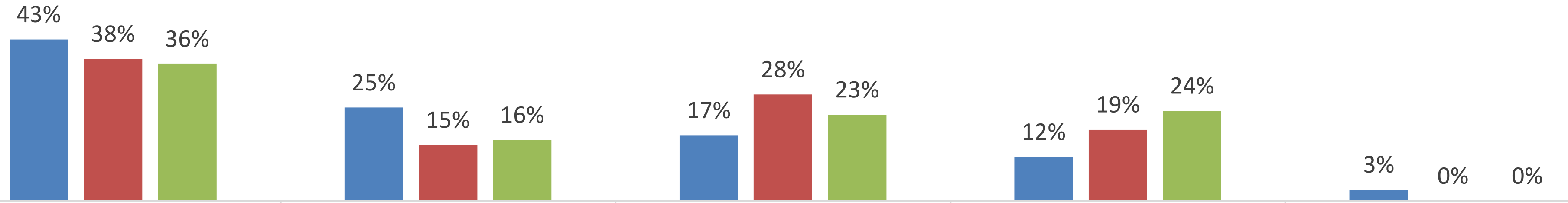
Grand Total 9 June to 15 June 16 June to 22 June

Q: Would your business survive for six months in the current situation? (76)

Research Outputs – Business Recovery

This weeks results show a marked change in the perception as to how long it will take to get back to business as usual. Just over a third (36%) believe that if Covid 19 were to end today, it would take them up to three months to get back to business as usual. This may be partly due to the imminent sector-specific guidance announcement and the expectation that hospitality businesses will be able to open from early July.

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



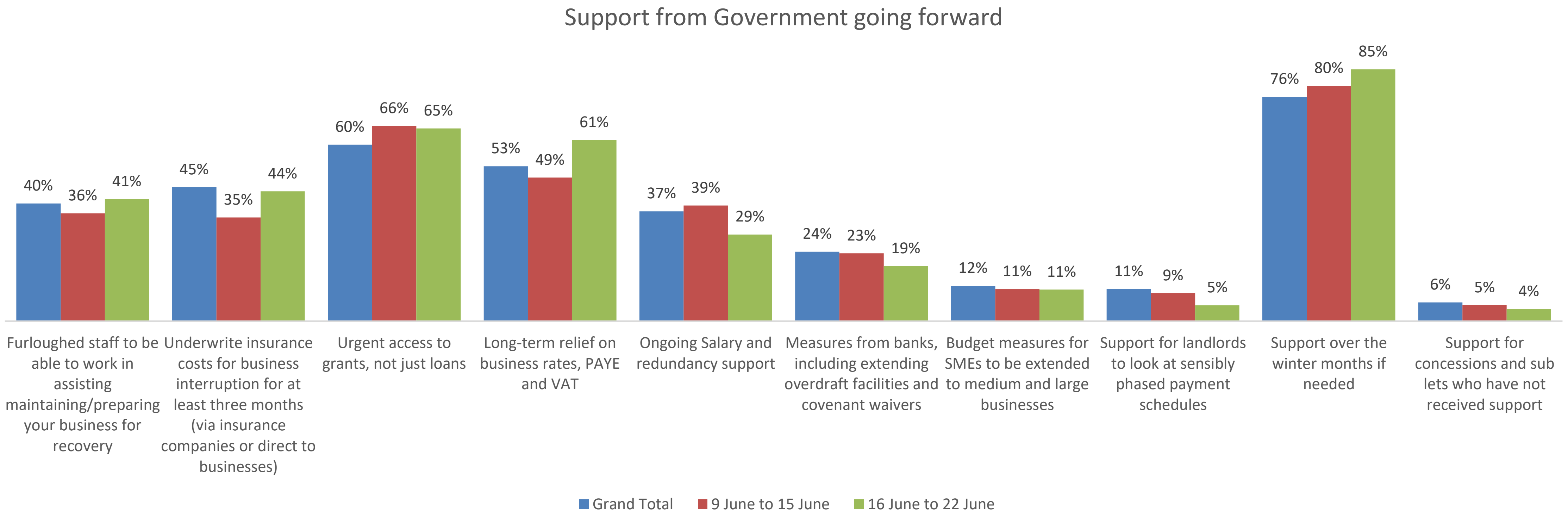
	1 to 3 months	3 to 6 months	6 to 12 months	Between one and two years	More than two years
Grand Total	43%	25%	17%	12%	3%
9 June to 15 June	38%	15%	28%	19%	0%
16 June to 22 June	36%	16%	23%	24%	0%

Grand Total   9 June to 15 June   16 June to 22 June

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? (76)

Research Outputs – Business Support

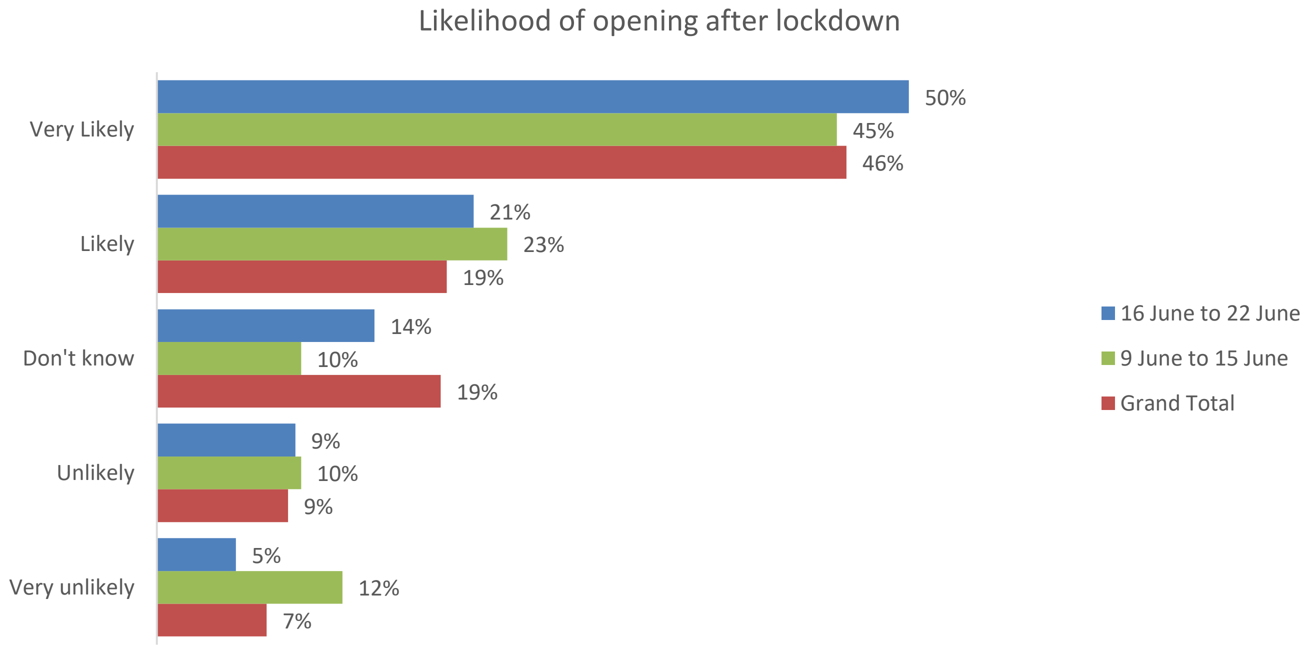
Increasing numbers of businesses (85%) are saying they will need support from government over the winter months. Also increasing this week are requests for long-term relief on business rates, PAYE and VAT.



Q: What support from Government would be crucial for your business going forward? (75)

Research Outputs – Business after lockdown

Most businesses have now made up their mind as to whether they will open their business, if the Government removes the lockdown, but keeps social distancing and safety measures still in place. About seven out of ten are likely (21%) or very likely (50%) to open after lock down. An equal percentage of business said they are either unsure (14%) or unlikely to open (9% said 'unlikely' and 5% 'very unlikely').



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. (96) Q: Please could you explain the reasons as to why you would or would not open? (76)

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: staying closed until next season and laying off staff

Sort term

Overall, there is an urgent need for guidance on opening date and social distancing

A definite date when accommodation can open

Level of social distancing that will apply for the sector

if we can not open at least we can hopefully take steps to hopefully keep our businesses afloat till next season.

Long term

Extra bank holiday in September and October

Winter survival is a major longer terms concern

End of furlough scheme - Inability to keep staff beyond October due to the lack of income over the last few months

Further grant support for winter months

"More info on when we can open. Everyone is saying the 4th July, however need time to be able to get stock in... we need the guidelines asap to be able to make any changes needed."

"If we can not open at least we can hopefully take steps to hopefully keep our businesses afloat till next season."

"Still no details of responsibility and costs if a guest becomes infected and has to isolate for 14 days. Do they have to pay for the stay, do we have to offer the stay free of charge, What services must we supply all not stated on gov.uk regarding this?"

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? (31 excluding 'no', 'd/k', n/a, etc.)

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