

# Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and  
Business Improvement Area

Week 16: 14 July to 20 July

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 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 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 weekly sample size is as follows: 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 9, 76 in week 10, 74 in week 11, 76 in week 12, 60 in week 13, 57 in week 14, 57 in week 15 and 39 in week 16.

### 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 14 July and 20 July 2020 - Key developments:

### From 17 July

- Anyone may use public transport, but alternative transport modes recommended.
- From the 25 July – indoor gyms and pools can reopen.

### From 1 August

- There will be an update to the guidance on returning to work.
- Most remaining leisure settings, bowling, skating rinks, and close contact beauty services will be allowed to reopen. Nightclubs and soft play will remain closed for now.
- Live performances will also restart, following some successful pilots this month. They will begin to pilot larger gatherings, (e.g. Sport stadia for reopening later in the autumn).
- Wedding receptions for up to 30 people will also be able to take place.

### September

- Schools, nurseries, and colleges to open on a full time basis.

### October

- Conferences and Business Events to resume in a COVID-secure way, subject to successful pilots.
- Audiences to return to stadia.

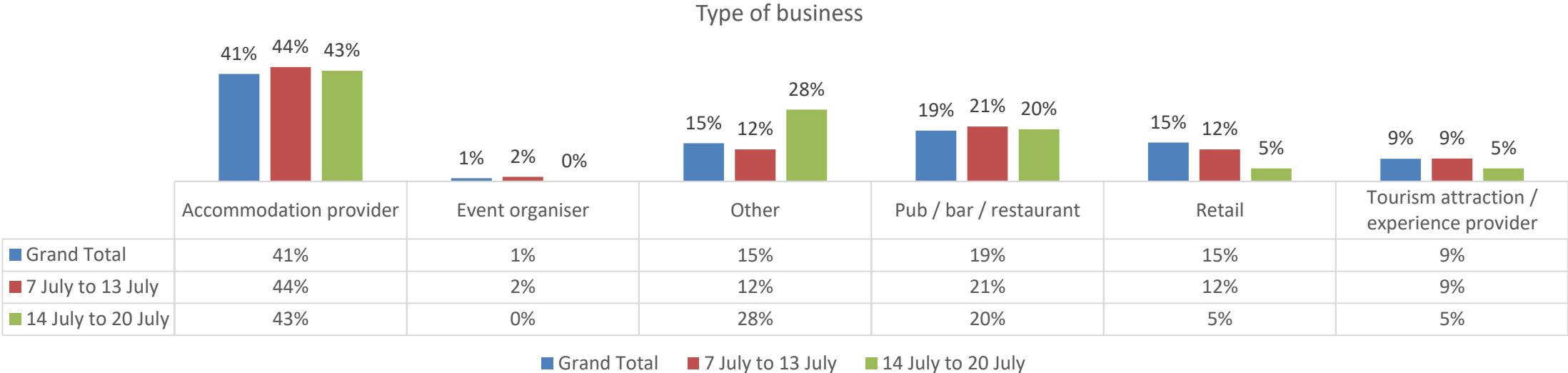
### November

- More close contact between friends and family in time for Christmas.



## Research Outputs – Business Profile

During week 16 there was a decrease in the number of retail businesses and tourist attractions and experience providers. There was also an increase in the ‘other’ business category.



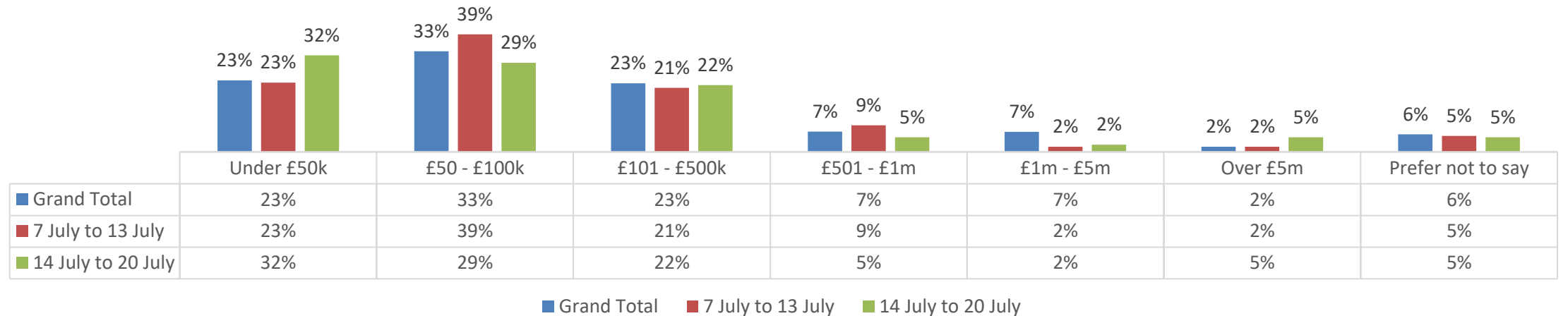
Q: What type of business do you run? (39)



## Research Outputs – Business Profile

Businesses with turnover up to £100k account for three in five businesses included in the sample (62% combined). This week we saw a 9% increase in the under £50k bracket and a reduction in the £50k to £100k brackets compared to previous weeks. Overall, 83% of all responses have been from SMEs (turnover up to £500k).

Company's approximate turnover last year

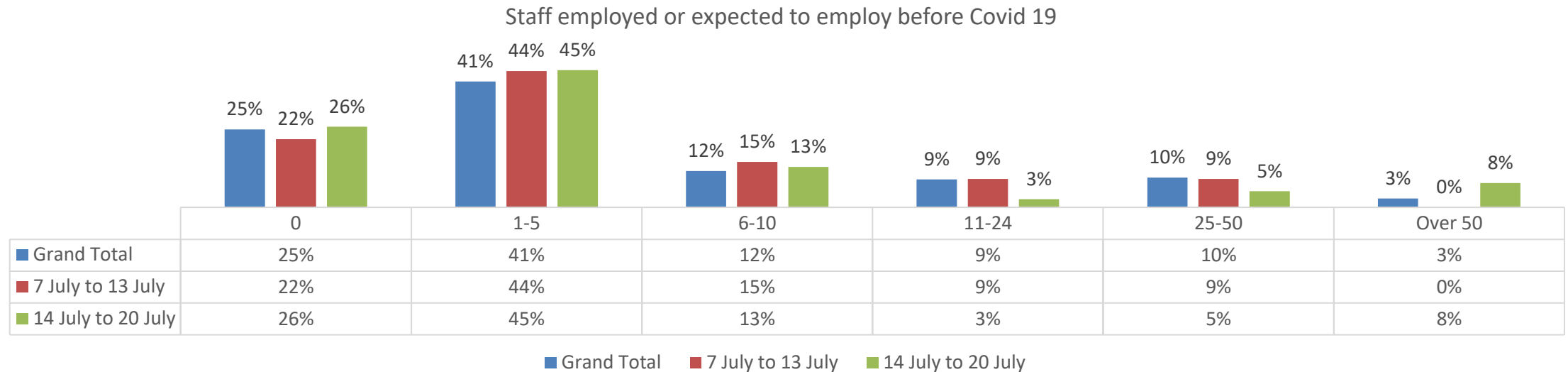


Q: What was your company's approximate turnover last year? (38)



## Research Outputs – Staff and employment changes

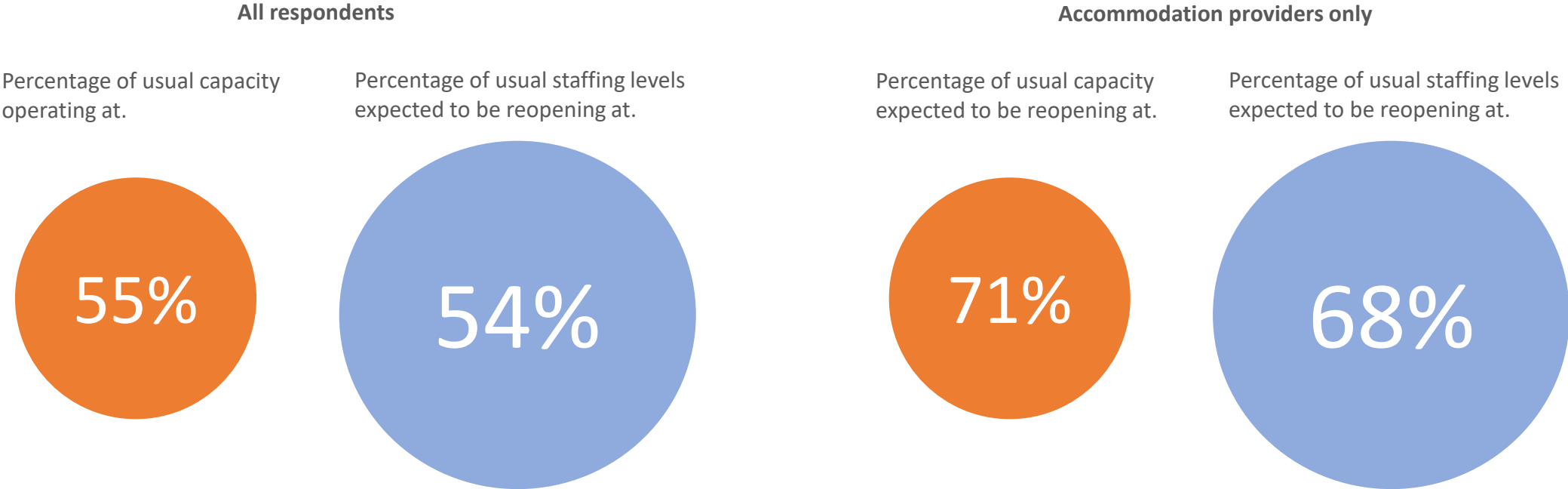
A few changes in the size of businesses taking part in the survey. There was an increase in the proportion of businesses that don't employ anyone - up four points to 26%. There were drops in the 11-24 and 25-50 categories as well as a marginal reduction in the 6-10 group. The over 50 staff group accounted for 8%, whereas last week there were no businesses in that category.



Q: How many staff did you employ or expected to employ before the start of the Covid 19 crisis? (36)

## Research Outputs – Staff and employment changes

The large majority of businesses have started re-opening. Most businesses are operating at half of their usual capacity (55% of normal operations). Similarly, they are employing just over half (54%) of their usual staff.. Note that for accommodation providers only, the percentages are 71% and 68% respectively but these results are based on a relatively small base).

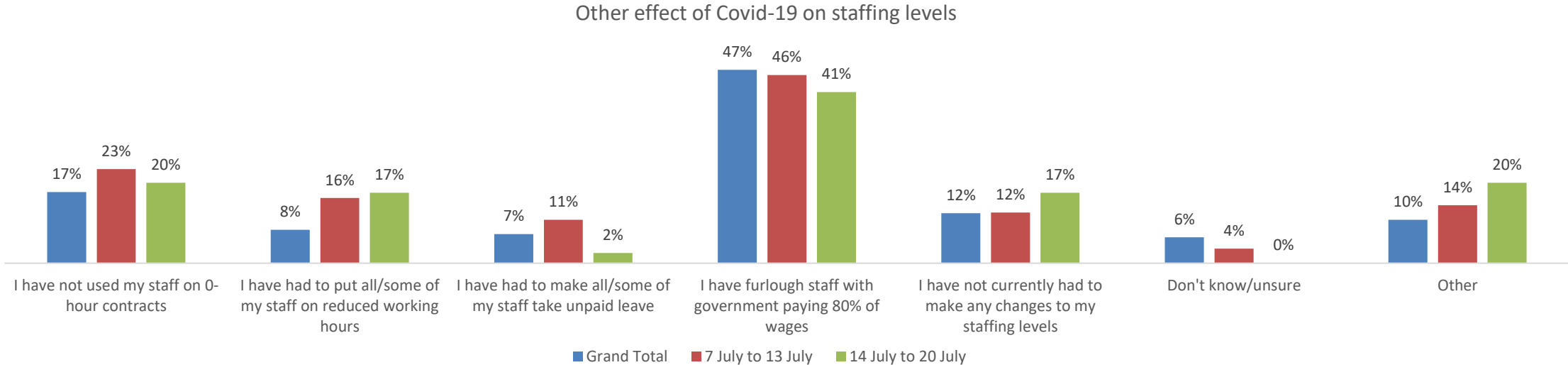


*Q: If you have reopened, approximately what percentage of your usual capacity are you operating at? Q: Approximately what percentage of your usual staffing levels are you operating at? (37,37)*



## Research Outputs – Staff and employment changes

This week there was a 3 percentage points drop in the proportion that had not used their staff of 0-hour contracts, down to 20% on last week but 3% higher than the overall average. Also significant is the increase in the number of businesses that have put ‘other’ measures in place, up to 20%. These mainly relate to not talking on any staff following the end of the lockdown period.



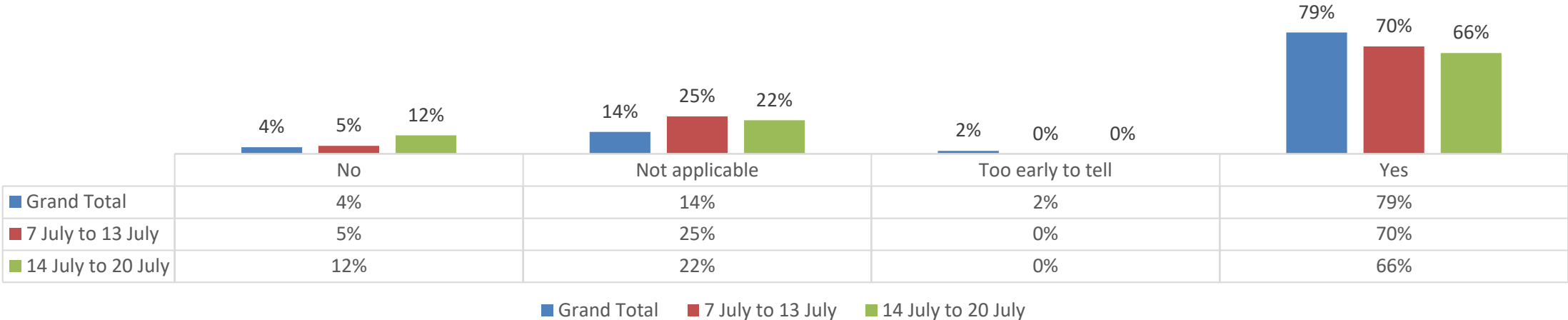
Q: What other effect has Covid-19 had on your staffing levels to date? (37)



## Research Outputs – Impact on bookings and turnover

The proportion of businesses that reported changes to existing bookings/sales because of Covid 19 this week is 66%, four percentage points below last week’s and 13% down on the 16-week average. Note that there’s a significant minority that deem the question not applicable to their business model.

Changes to existing bookings/sales because of Covid 19

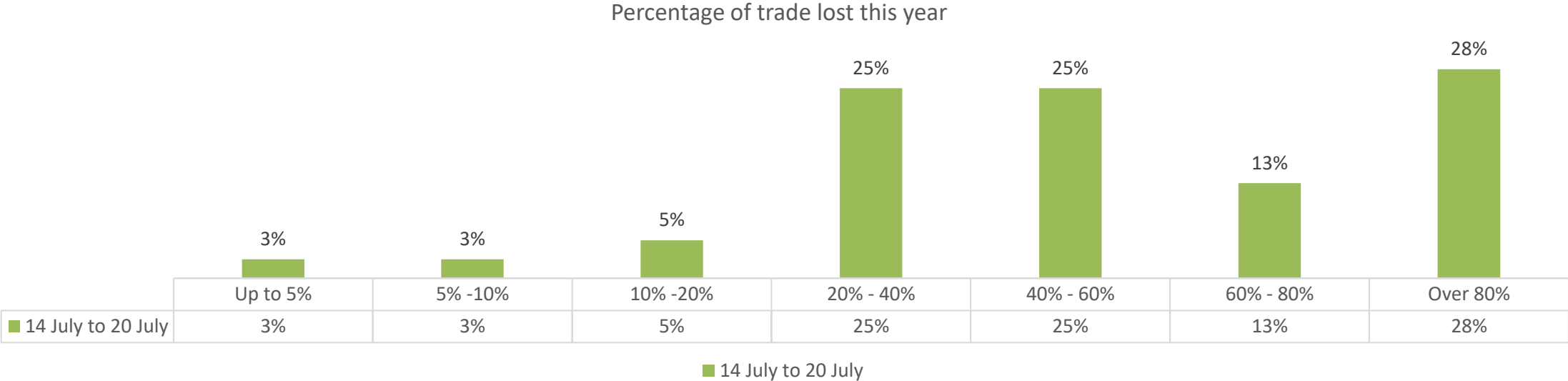


*Q: Have there been any changes to existing bookings/sales because of Covid 19?  
Changes to dates or other details but not outright cancellations of bookings (38)*



## Research Outputs – Impact on bookings and turnover

This question was changed from assessing the percentage trade lost to date to the percentage of trade lost this year. The new question shows that Covid-19 has already had a severe impact on the local tourism industry. Almost three in ten (28%) have lost over 80% of their trade so far this year. The majority have lost between 20% and 60% (split equally between those that lost between 20% and 40% and those down between 40% and 60% in usual trading levels).



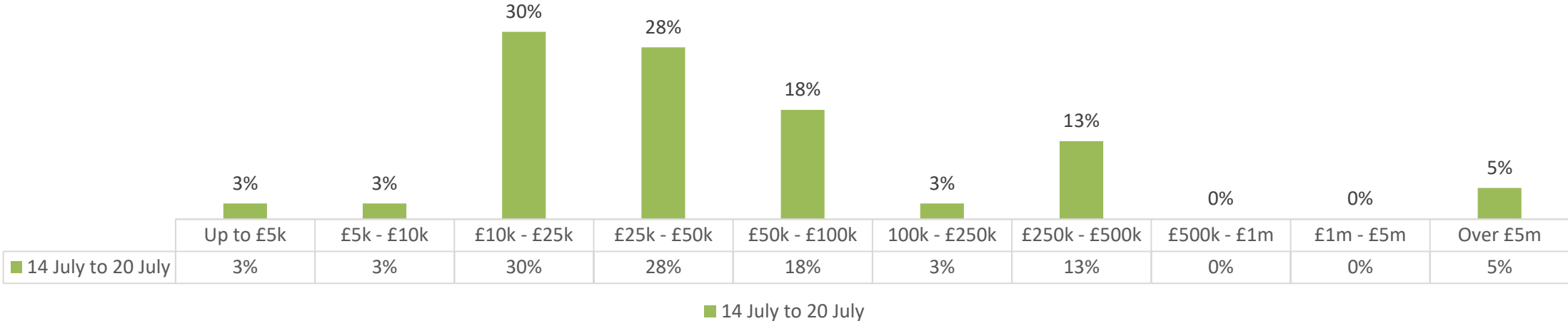
Q: If your trade has decreased what percentage of trade would you say you have lost this year? (35)



## Research Outputs – Impact on bookings and turnover

In most cases, the lost trade identified in the previous chart amounts to between £10k and £50k, which combined account for 58% of all respondents. A further 15% report losses of between £250k and £500k.

How much could this mean in terms of lost turnover?

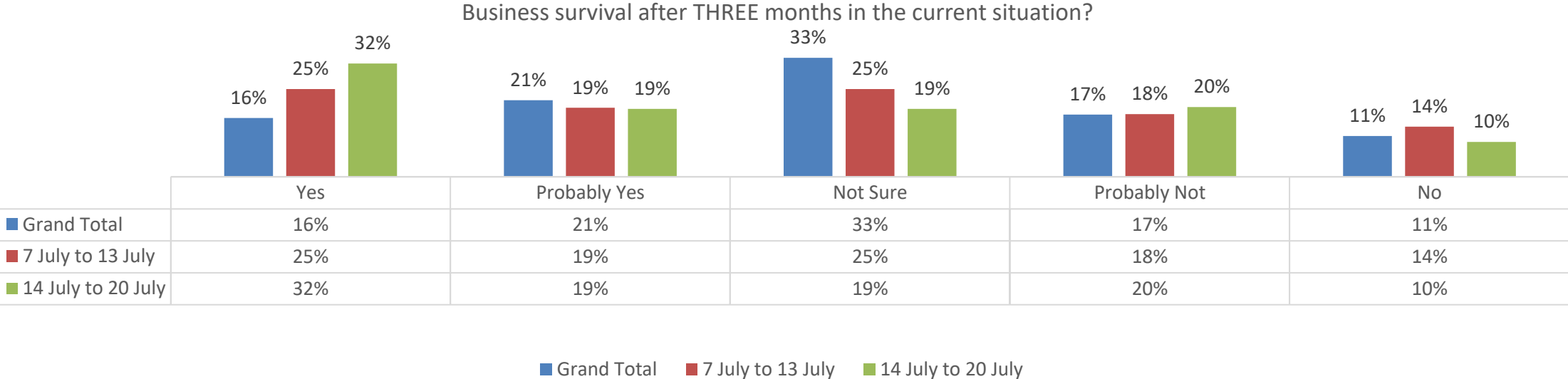


Q: Approximately how much could this mean in terms of lost turnover? (39)



## Research Outputs – Business Survival

About half (51%) have a positive outlook on their likelihood or surviving the next three months. However, just under a third (30%) don't expect to survive longer than three months and 19% are still not sure.



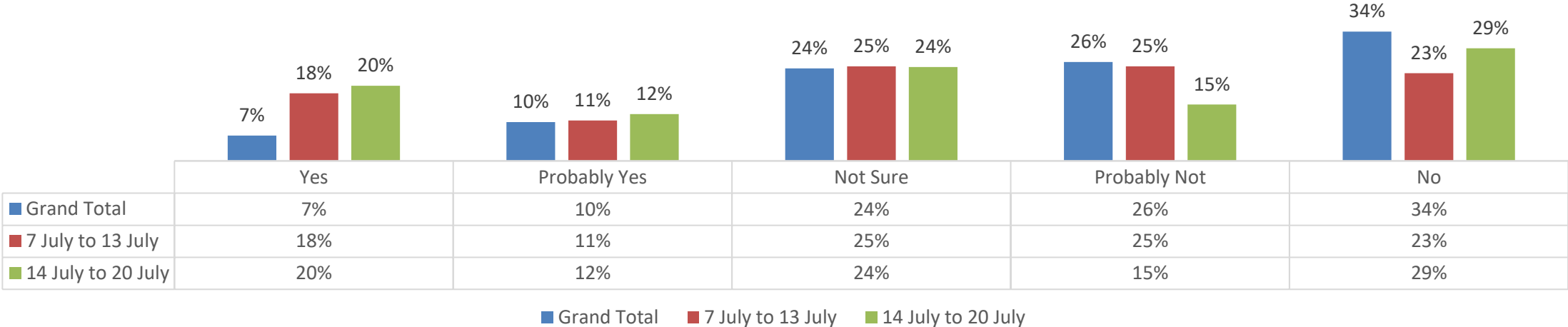
Q: Would your business survive for three months in the current situation? (39)



Research Outputs – Business Survival

Those ‘not sure’ about their survival after six months account for 24% of the sample and 32% are confident they will survive for six month in the current situation. More than two in five (44%) think they probably won’t survive after six months.

Business survival after SIX months in the current situation?



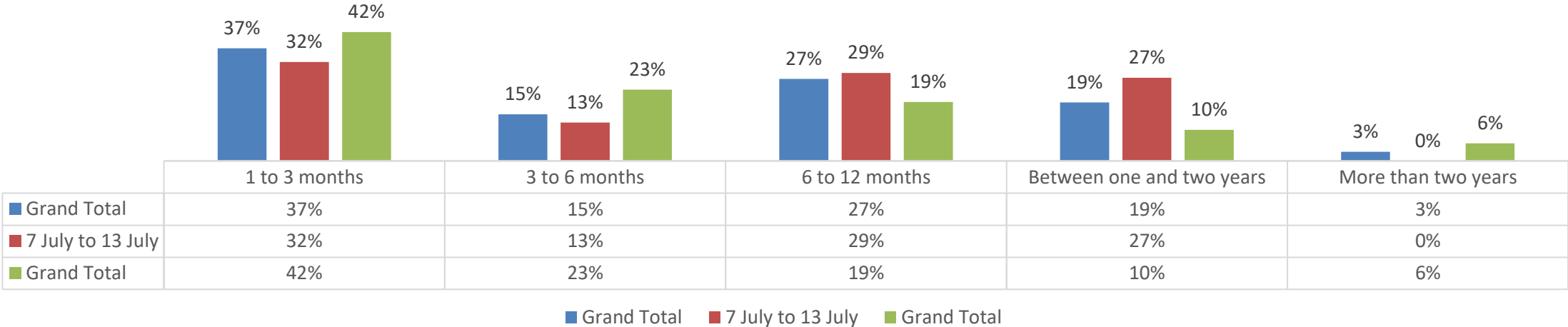
Q: Would your business survive for six months in the current situation? (38)



## Research Outputs – Business Recovery

Should trading restrictions linked to Covid-19 end today, the majority of businesses would expect to need up to 6 months to get back to business as usual. More than two in five (42%) believe it would take them between 1 and 3 months and a further 23% would expect to need between 3 and 6 months.

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



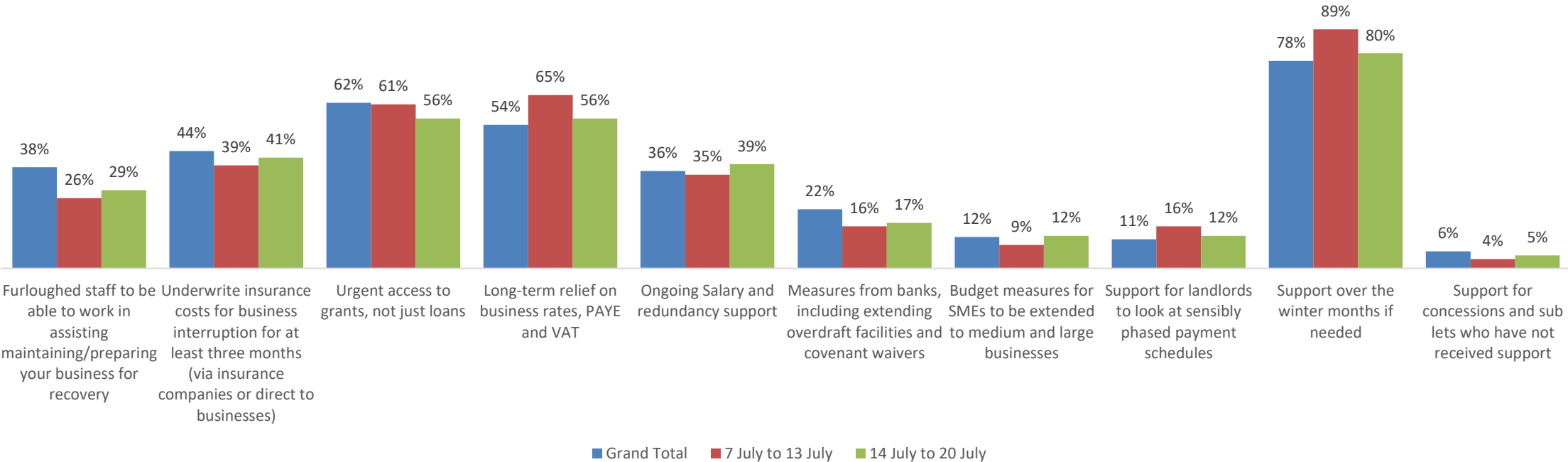
*Q: If Covid 19 and all trading restrictions were to end today, how long would you estimate it would take for your company to get back to business as usual? (38)*



## Research Outputs – Business Support

Four in five businesses (80%) are saying they will need support from government over the winter months. The long term relief on business rates, PAYE and VAT and urgent access to grants, not just loans were each selected by 56% of respondents.

Support from Government going forward

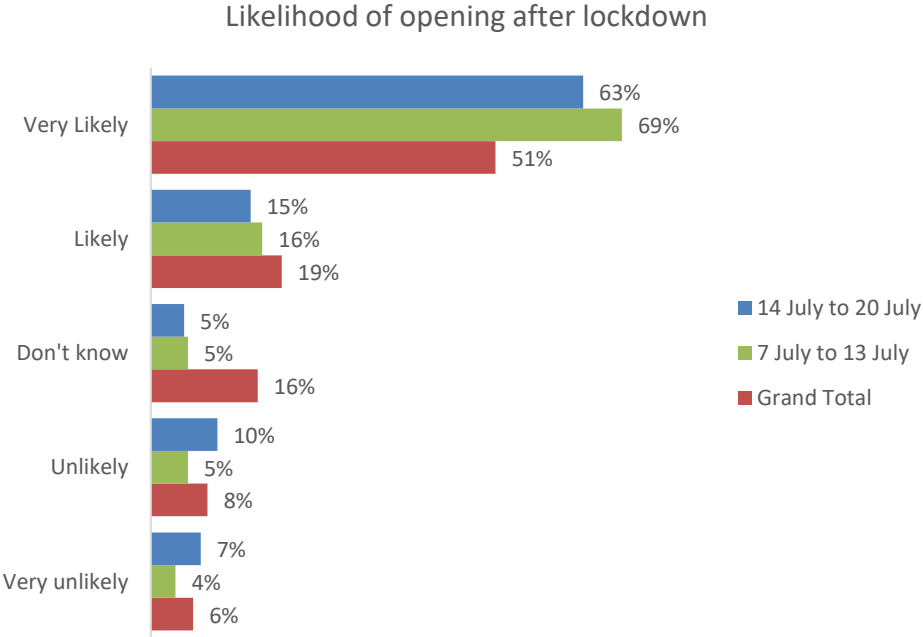


Q: What support from Government would be crucial for your business going forward? (39)



## Research Outputs – Business after lockdown

Following last week’s release of the sector specific guidance, just under two thirds (63%) are now very likely to open and a further 15% are ‘likely’ to open. Those unsure account for 5% and 17% are ‘unlikely’ to open (of which 7% are ‘very unlikely’ to re-open).



Q: How likely are you to open your business, based on the latest sector specific guidance and with social distancing and safety measures in place? (38)





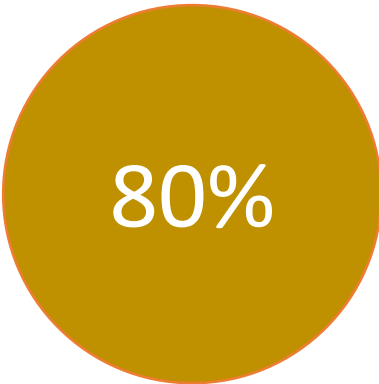
## Research Outputs – Further opinions

Respondents are currently operating at about half (51%) of their normal capacity for this time of the year. When asked about their willingness to open (or continue to open) in the winter, if Great Yarmouth could attract more winter visitors, four in five (80%) said they would open / stay open (down from 87% last week).

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



Businesses willing or able to open (or continue to open) their business in the winter.



*Q: What was your percentage of trade last week compared to the same week last year? (39)  
Would you be willing or able to open (or continue to open) your business in the winter, if Great Yarmouth could attract more winter visitors?*



## Research Outputs – Further opinions

The key message relates to extending the season. For this to happen businesses should remain open over the winter months (although some question whether it would make commercial sense). Out of season trade could be helped with events and shows over winter, for example with a Christmas fair and lights along the front.

More generally, a number of businesses continue to be asking for free parking and general improvements and cleanliness of the area.

Businesses themselves would be willing to stay open over winter. The biggest change would need to be the introduction of extra heating units to keep their businesses warm over the colder months and more indoor space made available to visitors.



*Q: What do you think Great Yarmouth needs to do to attract visitors to the area in the winter? (32)*

*What changes would you need to make to your business, to make it better suited to operating in the winter? (22)*

## 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**

Loans to be paid back only when businesses return to profitability

Consumer confidence has not picked up and it will take a long time to get back to normal levels of trade.

### **Longer term**

Rent concessions from private landlords and / or local authority.

More / ongoing financial help over the next few months until more normal trading conditions pick up.



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



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