

Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and
Business Improvement Area

Report 24: 5 October to 19 October

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 continuous 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. The report includes a breakdown of responses by week as well as an average of all responses to date. The week 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, 39 in week 16 , 80 in week 18; 73 in week 20, 63 in week 22 ; 47 in week 24; 55 in week 25 and 59 in week 26. (Note that there was a two week break since the week 18 online survey).

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 5 October to 19 October - Key developments:

New COVID Alert Levels in England

From 12 October, standardise and simplify local lockdown measures were introduced. A three-tiered system of local COVID Alert Levels in England - set at medium, high, and very high. East of England is currently in the 'Medium' category, but local changes are possible at any time.

- **Local COVID Alert Level – Medium:** Covering most of the country - this will consist of the current national measures, which came into force on 25 September.
- **Local COVID Alert Level – High:** This is for areas with a higher level of infections. The “high” alert level will reflect many current local interventions, but there will now be consistency across the country.
- **Local COVID Alert Level - Very High:** This is for areas with a very high level of infections. The Government will set a baseline of measures for any area in this local alert level. Consultation with local authorities will determine additional measures.

Essex (area covered by Essex County Council only) moves local COVID alert level medium to local COVID alert level high from Saturday 17 October 00:01:

Latest financial support measures announced:

- The new Job Support Scheme starts in November (for six months) to subsidise wages for staff on shorter hours and has been expanded to support businesses that are asked to close due to restrictions by covering two thirds of each employees' salary. The current furlough scheme will continue until the end of October.
- Additional funding for local authorities entering level three "very high" restrictions will be available - up to half a billion pounds to fund enforcement, compliance, and contact tracing. Also to protect vital services the Government will be providing around a billion pounds of additional funding for all local authorities.

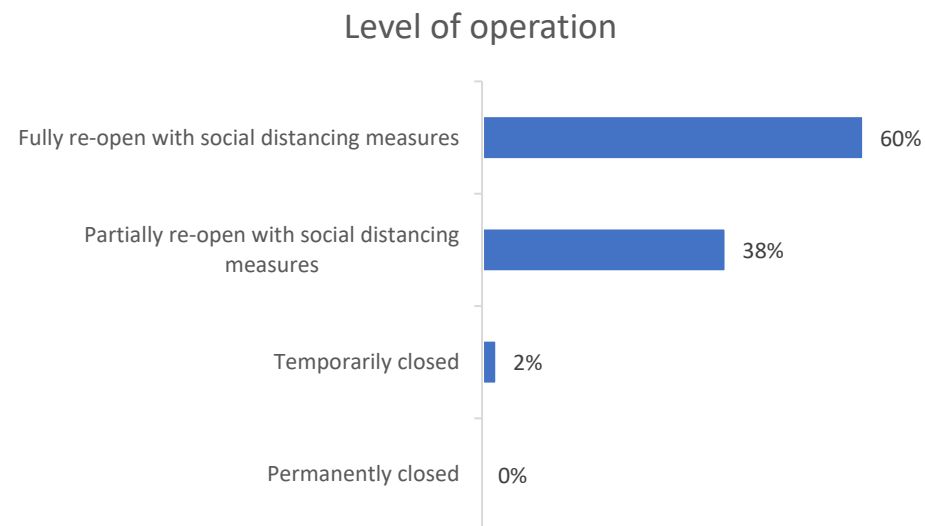
Visitor Economy Guidance Updated

- The [primary guidance for Visitor Economy businesses](#) on working in a COVID-safe manner has been updated to include guidance for event organisers and local authorities on outdoor events.



Research Outputs – Business Profile

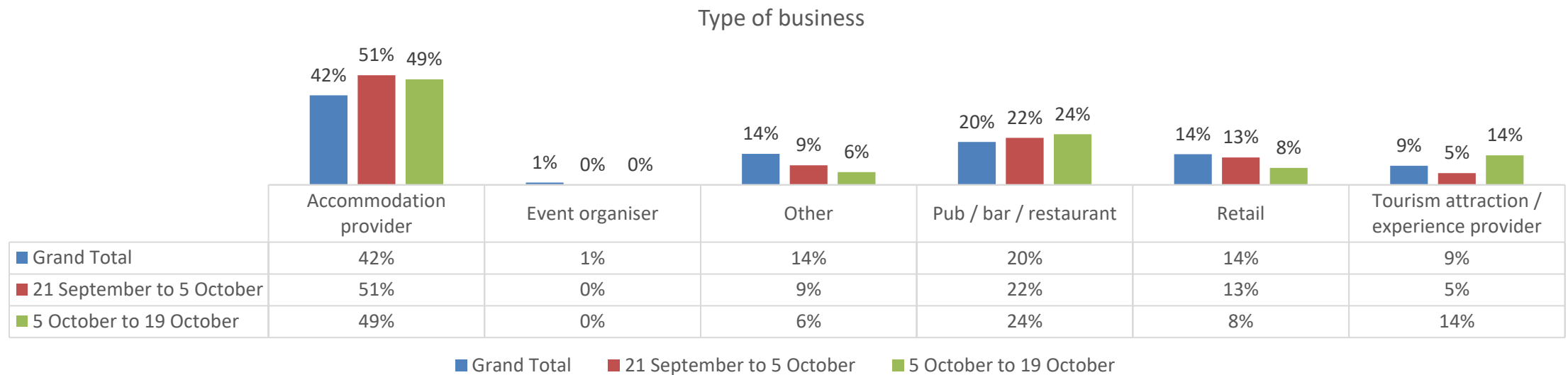
This week we introduced a new question, looking at the current operational status of respondents. Three in five (60%) were fully open and with social distance measures in place. Almost two in five (38%) said they were only partially open and with social distance measures in place. A small proportion of the sample (2%) had temporarily closed. It should be noted that businesses that have closed, temporarily or permanently, may have decided not to take part in the survey and therefore may be under-represented.



Q: What is the current status of your business? (51)

Research Outputs – Business Profile

The latest sample shows a slight reduction in the proportion of accommodation providers (down 2% on the last report, to 49%) and a 2% increase in the proportion of pubs / bar / restaurants. There was a significant increase in the proportion of tourism attractions (up to 14%, from 5% in the previous wave) and only small variations in the other types of tourism businesses taking part in the survey.

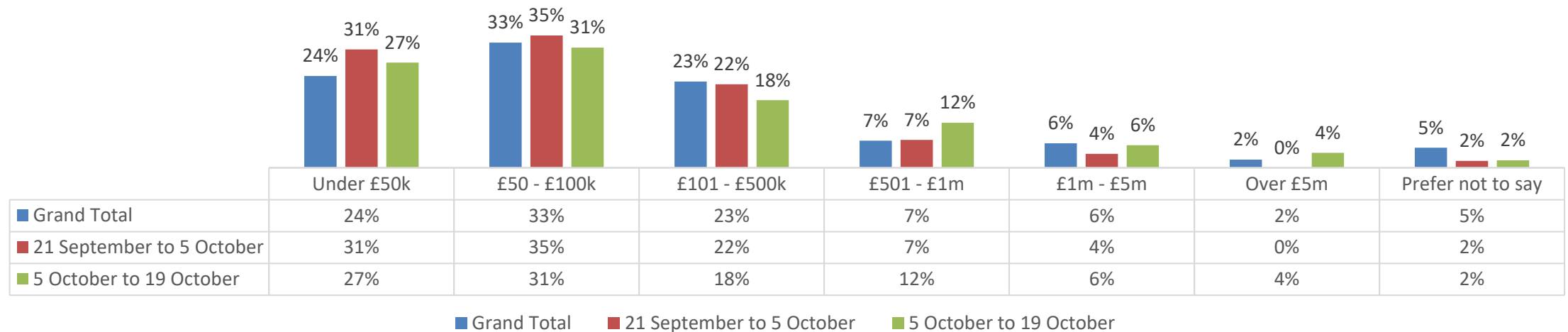


Q: What type of business do you run? (59)

Research Outputs – Business Profile

Businesses with turnover up to £100k accounted for three in five businesses (58%). There was a 5% increase in the proportion of businesses with turnovers between £500k and £1 million, to 12%. Similarly, those reporting turnovers of £1m to £5m accounted for 6% (up from 4% in the previous wave) and larger businesses (turnover over £5m) accounted for 4% of all respondents. Overall, three quarters (76%) of all responses have been from SMEs (turnover up to £500k).

Company's approximate turnover last year



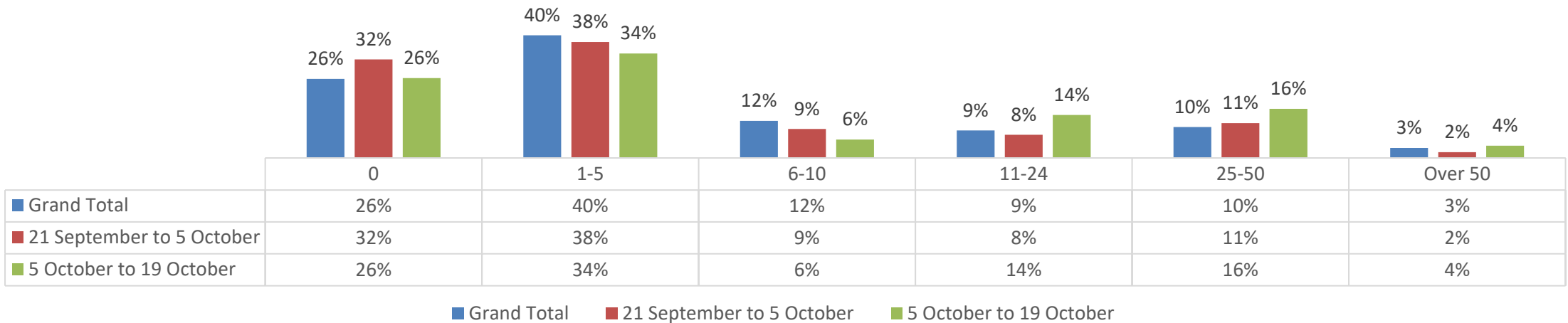
Q: What was your company's approximate turnover last year? (58)



Research Outputs – Staff and employment changes

There was a 6% drop in the proportion of businesses that don't employ anyone – from 32% down to 26%. Similarly, there was a 4% decrease in the 1-5 categories (34%, down from 38% in the previous report). Medium and larger establishments showed substantial increases – those employing 11-24 people accounted for 14% (up from 8% in the previous wave), the 25-50 group was also up 5% to 16% of the total sample and the Over 50 group doubled from 2% to 4%.

Staff employed or expected to employ before Covid 19



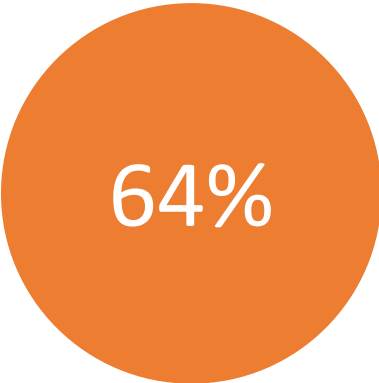
Q: How many staff did you employ or expected to employ before the start of the Covid 19 crisis? (59)

Research Outputs – Staff and employment changes

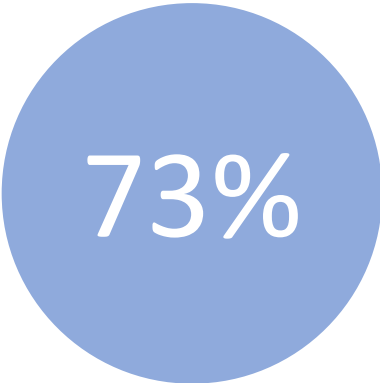
On average, businesses are operating at 64% of normal capacity. They are necessitating 73% of their usual staff. Note that for accommodation providers only, the percentages are very similar at 66% and 76% respectively.

All respondents

Percentage of usual capacity operating at.

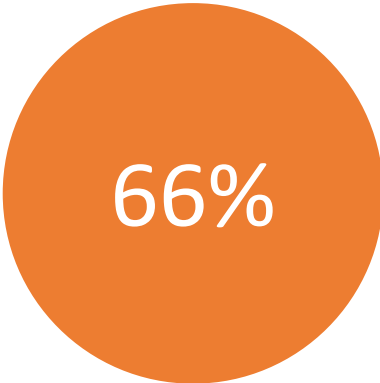


Percentage of usual staffing levels expected to be reopening at.

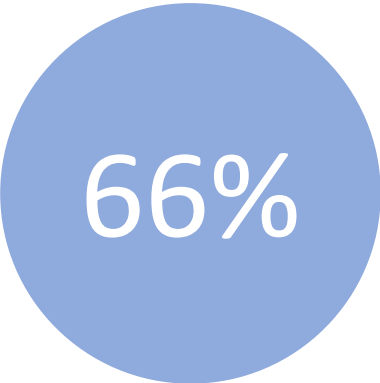


Accommodation providers only

Percentage of usual capacity operating at.



Percentage of usual staffing levels operating at.

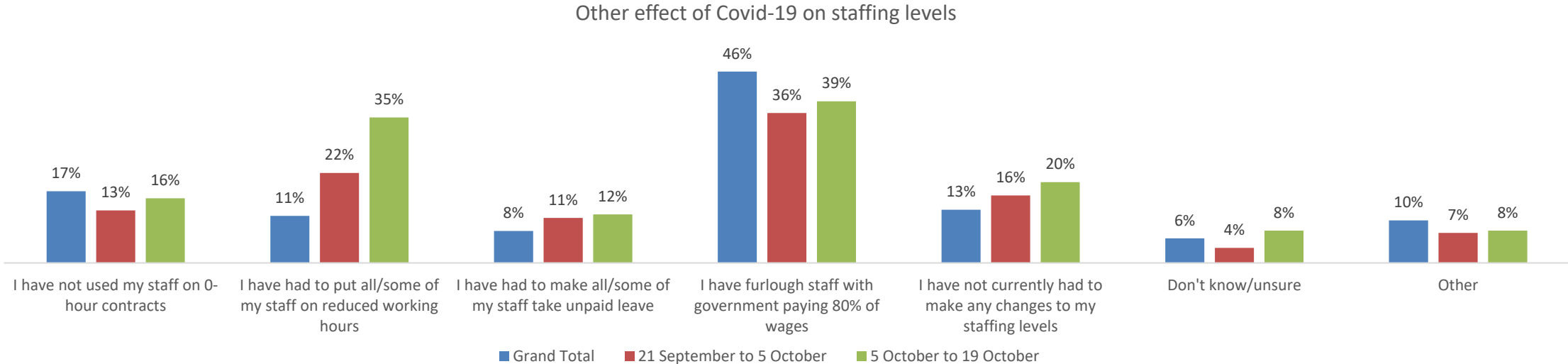


Q: If you have reopened, approximately what percentage of your usual capacity are you operating at? Q: Approximately what percentage of your usual staffing levels are you operating at? (57, 57)



Research Outputs – Staff and employment changes

There was a marked increase in the proportion of businesses that had to put some or all of their staff on reduced working hours (up to 35% from 22% in the previous wave). There was a small increase in the proportion of respondents that are still took advantage of the staff retention scheme and furloughed (some of) their staff, accounting for 39% (up from 36% in the previous wave).

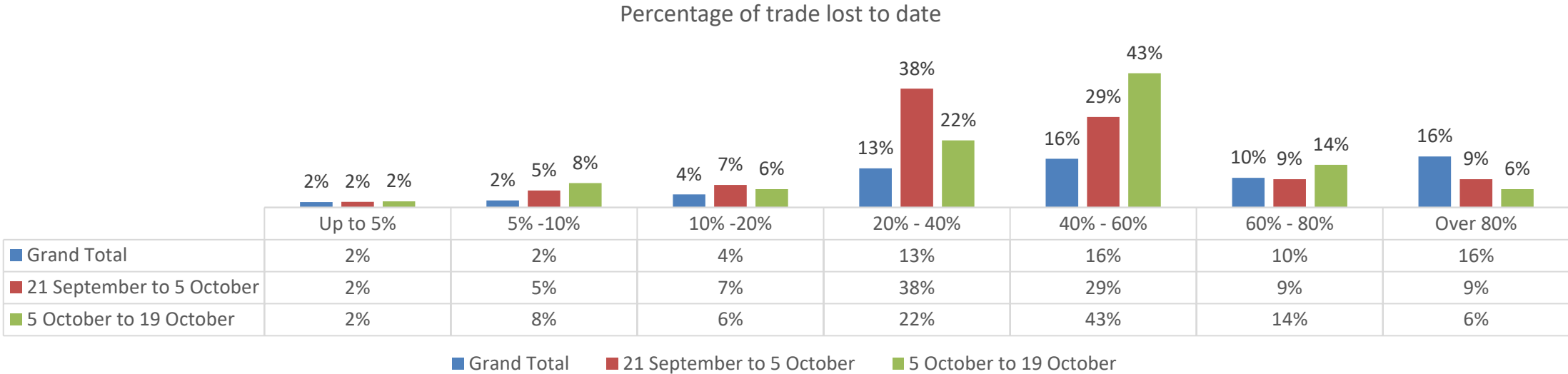


Q: What other effect has Covid-19 had on your staffing levels to date? (59)



Research Outputs – Impact on bookings and turnover

Overall, just over three in five (63%) of respondents have lost over 40% of this year’s expected trade, with the majority (43%) reporting losses of between 40% and 60% of their forecasted trade.



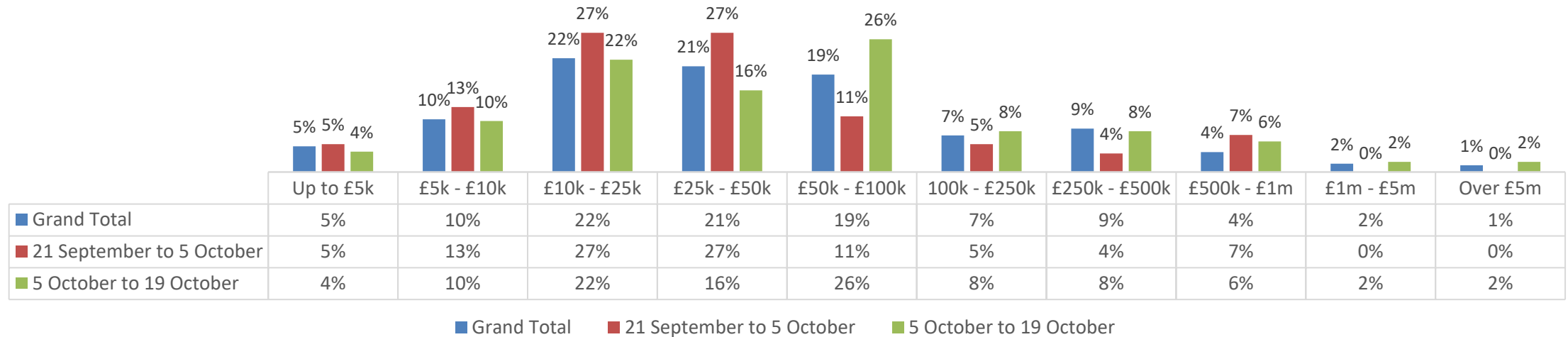
Q: If your trade has decreased what percentage of trade would you say you have lost this year? (59)



Research Outputs – Impact on bookings and turnover

In most cases, the lost trade identified in the previous chart amounts to between £10k and £100k, which combined account for 64% of all respondents – of these, a quarter (26%) expect to lose between £50k and £100k. A further 22% report losses of between £100k and £500k.

How much could this mean in terms of lost turnover?

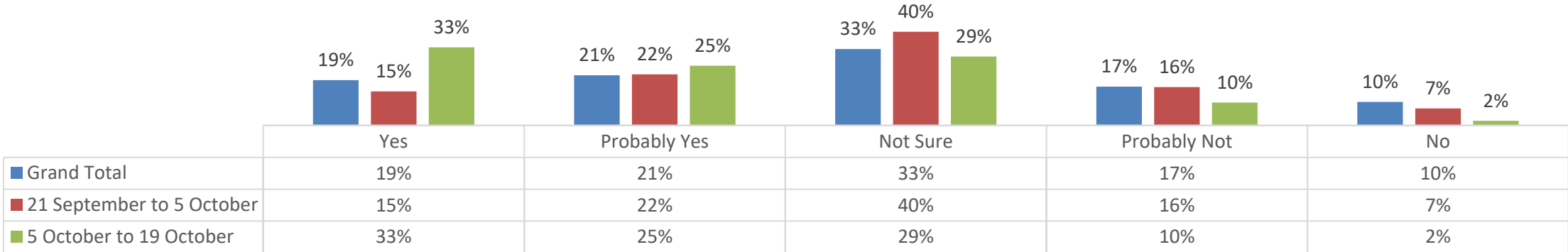


Q: Approximately how much could this mean in terms of lost turnover? (59)

Research Outputs – Business Survival

It is encouraging to see that almost three in five (58%) have a positive outlook on their likelihood or surviving the next three months, up from 37% in the previous report. Under a third (29%) are still not sure and 12% don't expect to survive longer than three months.

Business survival after THREE months in the current situation?



■ Grand Total ■ 21 September to 5 October ■ 5 October to 19 October



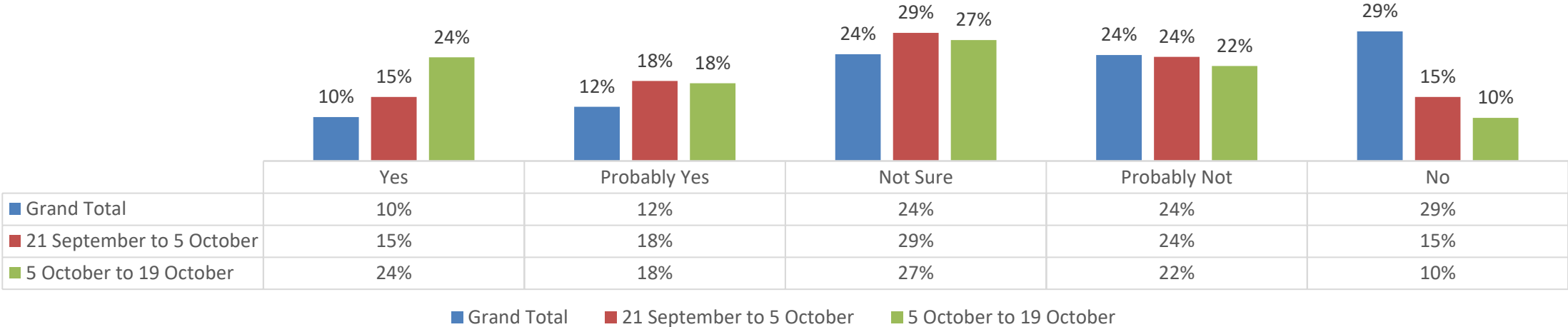
Q: Would your business survive for three months in the current situation? (59)



Research Outputs – Business Survival

Two in five (42%) are confident they will survive for six months in the current situation (up from 33%). Those ‘not sure’ about their survival after six months account for 27% of the sample. Almost a third (32%) think they probably won’t survive after six months. These results are more optimistic than those reported two weeks ago.

Business survival after SIX months in the current situation?



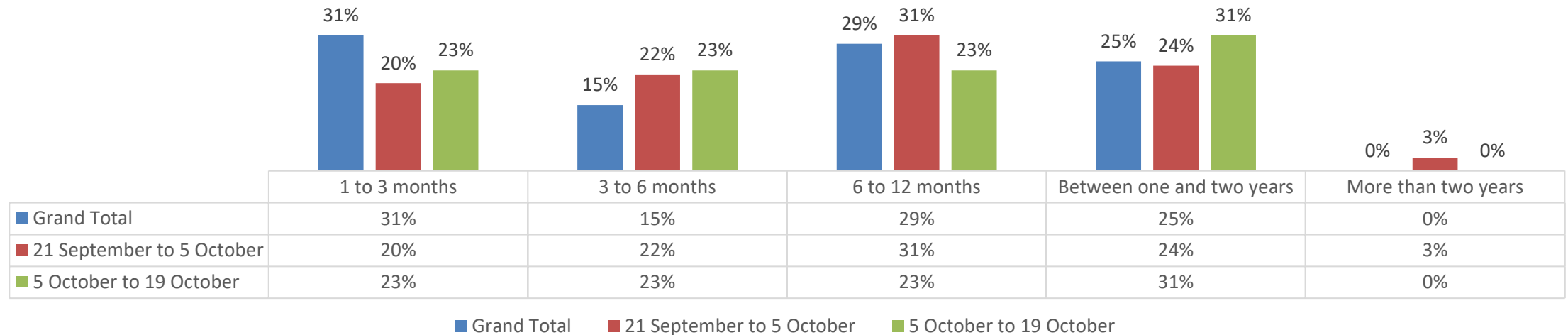
Q: Would your business survive for six months in the current situation? (59)



Research Outputs – Business Recovery

Should trading restrictions linked to Covid-19 end today, the majority of businesses (31%) would expect to need between one and two years to recover – up from 24% in the previous wave. Those expecting to need 1-3 months, 3-6 months and 6 – 12 months are split equally (23% each). Interestingly, the results show some polarisation, with increases for the 1-3 month group (up 3%) and the 1-2 year group (up 7%).

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

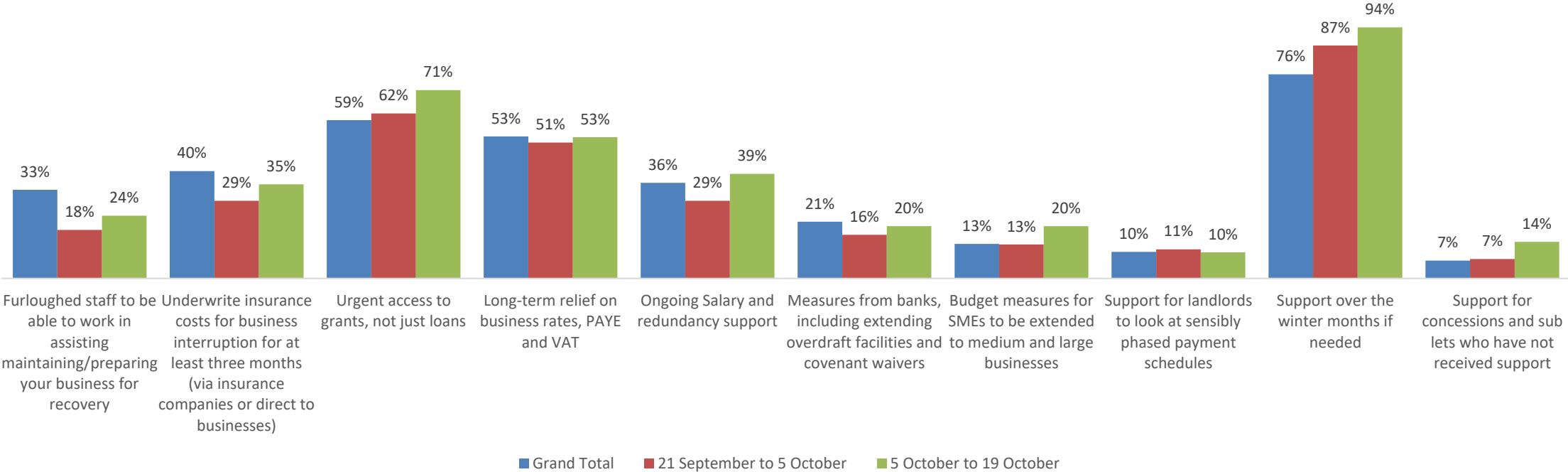


Q: If Covid 19 and all trading restrictions were to end today, how long would you estimate it would take for your company to get back to business as usual? (59)

Research Outputs – Business Support

The large majority (94%) are saying they will need support from government over the winter months. The urgent access to grants, not just loans and the long term relief on business rates, PAYE and VAT still important to businesses (71% and 53% respectively).

Support from Government going forward



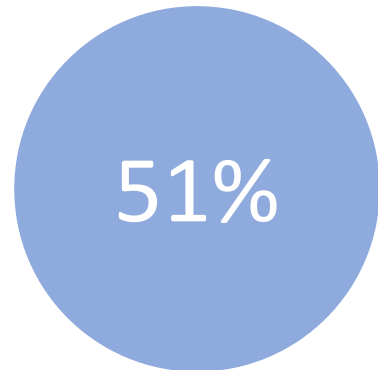
Q: What support from Government would be crucial for your business going forward? (57)



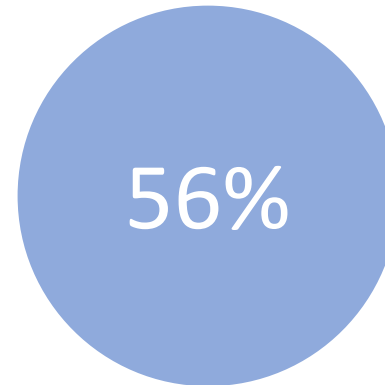
Research Outputs – Further opinions

Respondents are currently operating at just over half (51%) of their normal capacity for this time of the year. This is below the 56% achieved two weeks ago.

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



Previous report



Q: What was your percentage of trade last week compared to the same week last year? (56)

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 summarised below:

- Businesses are generally very cautious about winter trading given the new restrictions and the limited custom.
- However, there are still some signs of very late staycation bookings which can help business trade over the next few weeks.
- Some complain about the difficulty of attracting winter visitors when other businesses (retail, attractions) are closing for winter and public services also closing down.
- Financial support and grants continue to be essential for survival over winter months.



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



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