

# Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and  
Business Improvement Area

Report 26: 2 November – 16 November

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 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. 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 26; 59 in week 28; 62 in week 30 and 76 in week 32. (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 19 October to 2 November - Key developments:

### Second national lockdown - Rules

**Movement** - The key aspect of the Lockdown are that everyone must stay at home.

**Holidays** - as per the original lockdown, people cannot travel internationally or within the UK. This also means that people must stay in their primary residence and therefore cannot visit a second home or holiday home.

### **Business Closures**

- All non-essential shops, attractions, leisure and entertainment venues will be closed.
- Essential shops, including supermarkets, will remain open.
- Pubs, bars, restaurants and cafes must close, except for takeaway and delivery services.

### Second national lockdown - Financial support

Government announces support for businesses across the UK including a five-month extension of the furlough scheme until spring 2021. Key points from his announcement are:

The **Coronavirus Job Retention Scheme (CJRS)** has been extended until the end of March 2021 with employees receiving 80% of their current salary for hours not worked, up to a maximum of £2,500 per month.

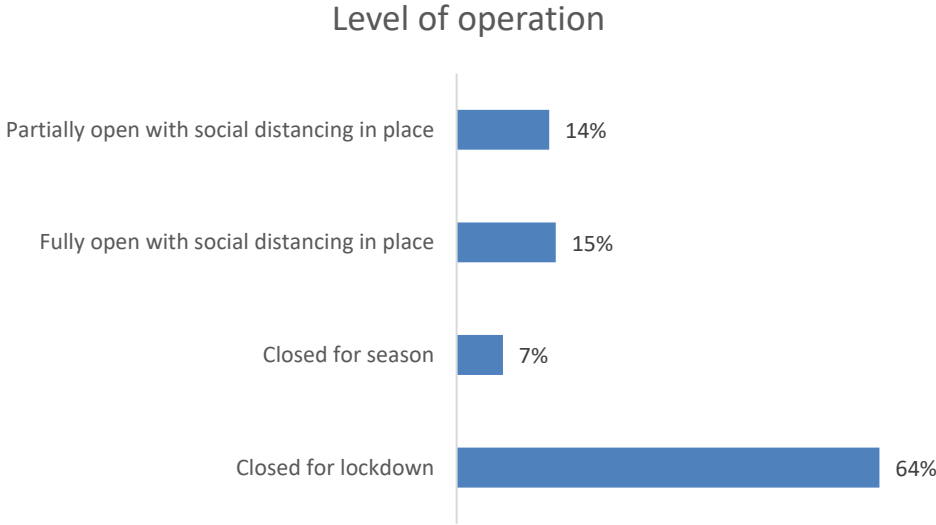
The **Self-Employment Income Support Scheme (SEISS)** will increase from 50% to 80% of average trading profits, up to a maximum of £7,500, for the period November to January.

The **Jobs Retention Bonus (JRB)** will not be paid in February and the Government will redeploy a retention incentive at the appropriate time.



## Research Outputs – Business Profile

Just over three in five business (64%) had to close down temporarily due to the new lockdown. A further 7% decided to close down for the season. About a third of respondents (29%) are still open with social distance measure in place. Of these, 15% are fully open and 14% only partially open. *Note that the optional responses to question were changed since the last report and we don't have week-on-week comparable results.*

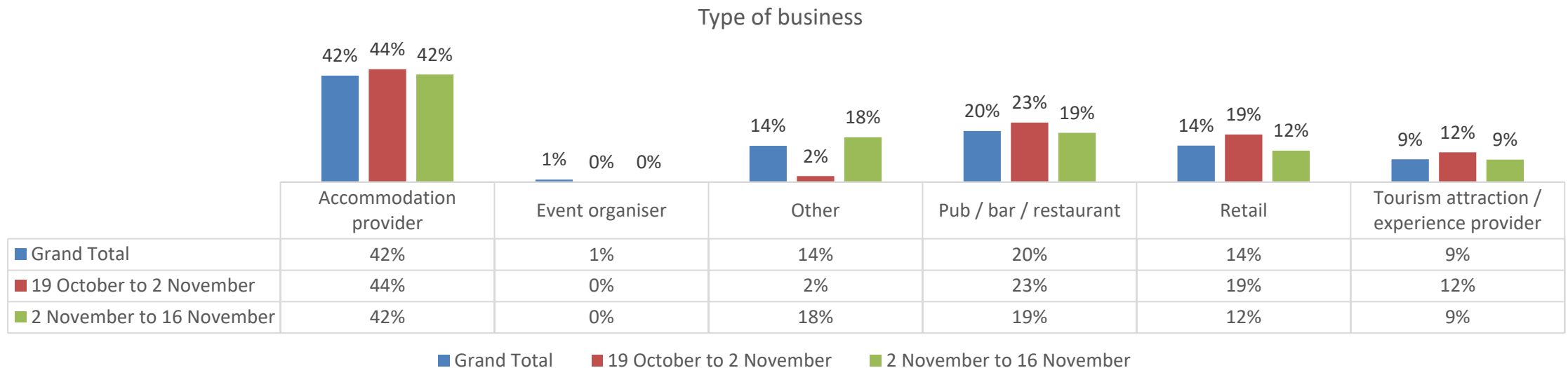


Q: What is the current status of your business? (76)



## Research Outputs – Business Profile

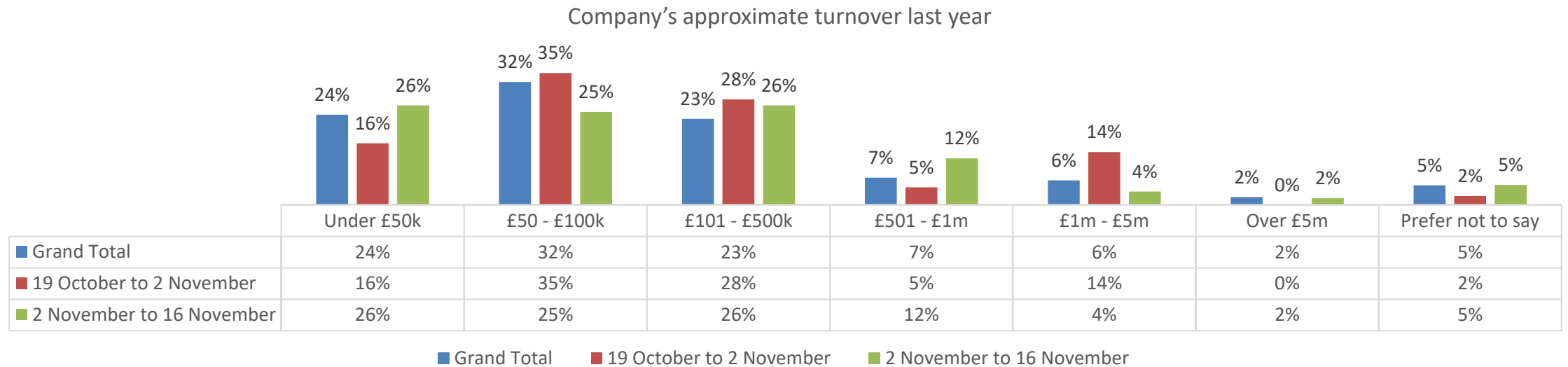
The latest sample shows a marginal reduction in the proportion of accommodation providers (down 2% on the last report, to 42%) and a 16% increase in the proportion of ‘other’ businesses. There were small decreases in the proportion of tourism attractions, retail and pubs, bars and restaurants.



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

## Research Outputs – Business Profile

Businesses with turnover up to £100k accounted for just over half (51%) of the total sample of participants. There was a 10% increase in the proportion of businesses with turnovers under £50k, up to 26%. Similarly, those reporting turnovers of £500k to £1m accounted for 12%, up from 5% in the previous wave. Overall, just over three quarters (77%) of all responses have been from SMEs (turnover up to £500k).

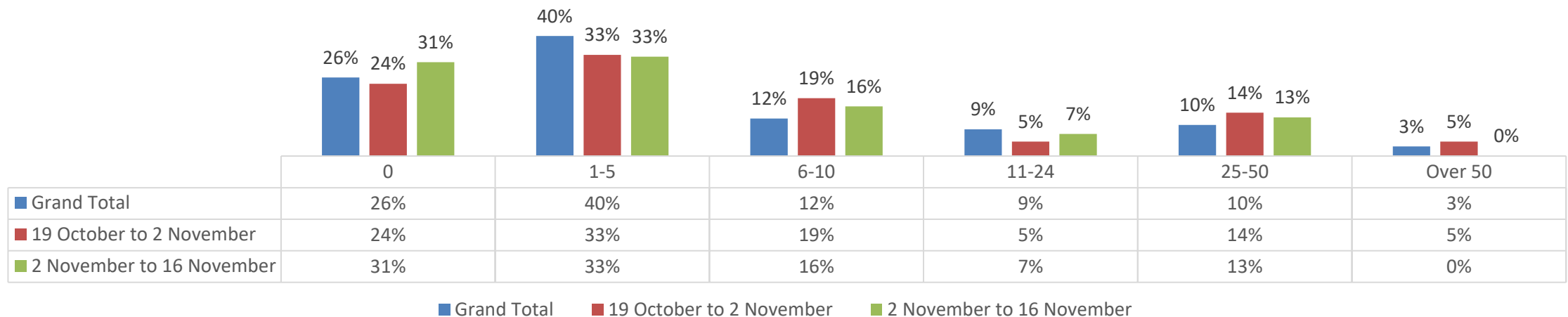


Q: What was your company's approximate turnover last year? (76)

## Research Outputs – Staff and employment changes

There was a 7% increase in the proportion of businesses that don't employ anyone – from 24% up to 31%. The proportion of those employing between 1-5 people was unchanged since the last wave. Those employing between 6 and 10 people accounted for 16%, down from 19% in the previous wave. Medium and larger establishments showed some marginal changes – those employing 11-24 people accounted for 7% (up from 5% in the previous wave), the 25-50 group was down by 1 point to 13% of the total sample and no businesses with over 50 employees took part in the wave.

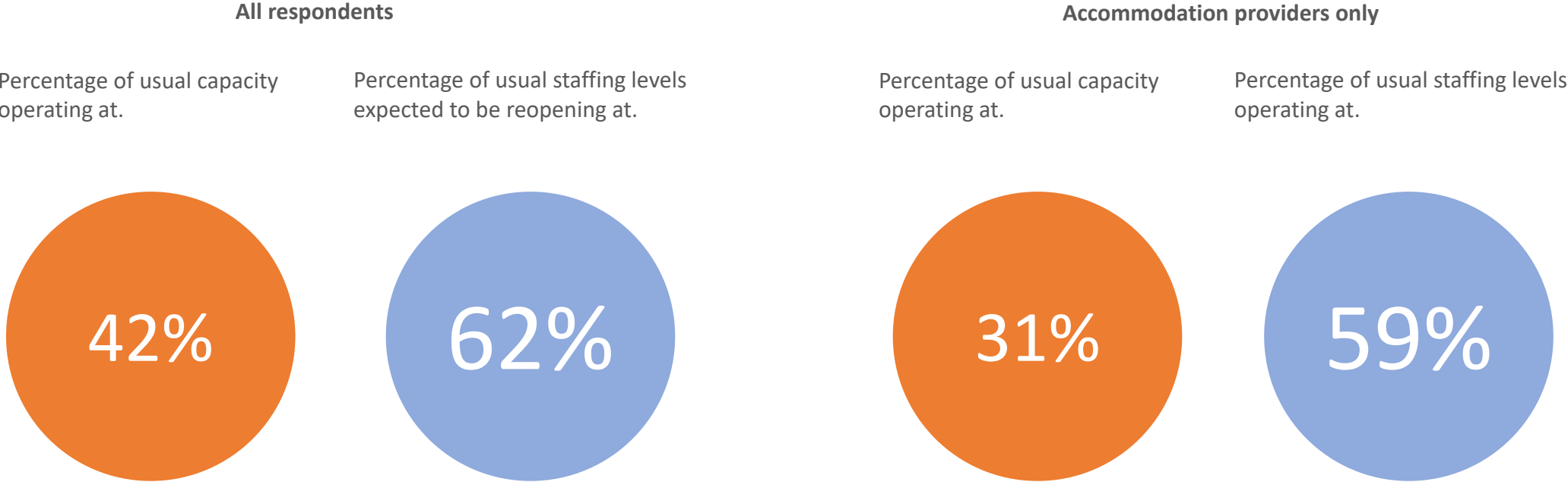
Staff employed or expected to employ before Covid 19



Q: How many staff did you employ or expected to employ before the start of the Covid 19 crisis? (75)

## Research Outputs – Staff and employment changes

On average, businesses are operating at 42% of normal capacity. They are necessitating 62% of their usual staff. When looking at accommodation providers only, the percentages are 31% and 59% respectively. Note that accommodation providers were operating at 55% two weeks ago and 66% four weeks ago. This change would confirm that accommodation providers are starting to close for the winter, as highlighted earlier on this report.

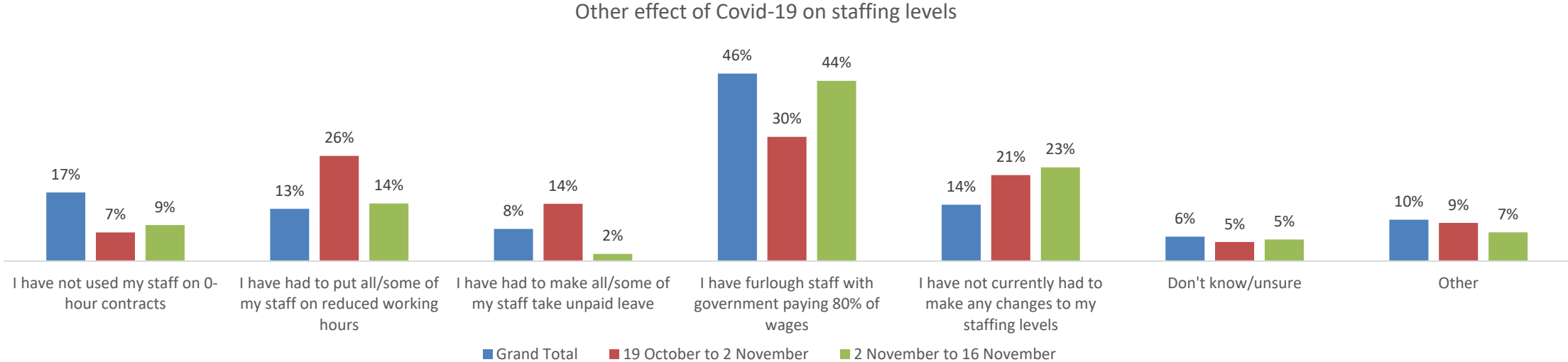


*Q: If you have reopened, approximately what percentage of your usual capacity are you operating at? Q: Approximately what percentage of your usual staffing levels are you operating at? (75,75)*



## Research Outputs – Staff and employment changes

The new lockdown restrictions and in particular the extension of the furlough scheme until March 2021 has resulted in a 14% increase in the proportion of respondents that have put staff on furlough (up to 44%). Conversely, only 14% had put some or all their staff on reduced working ours, down from 26% reported two weeks ago. Similarly, only 2% had to make staff take unpaid leave. Almost a quarter (23%) said they had not made any changes to staff levels (up from 21% in the previous wave).



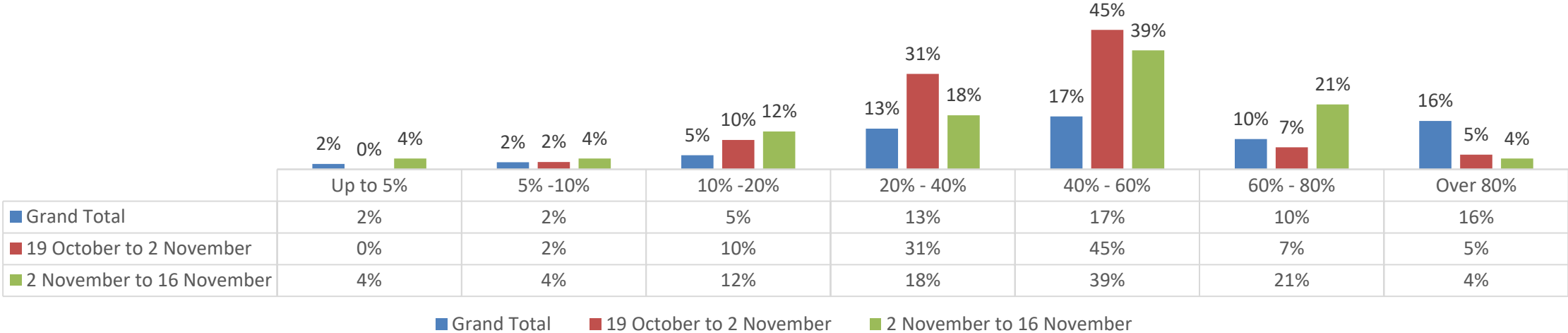
Q: What other effect has Covid-19 had on your staffing levels to date? (76)



Research Outputs – Impact on bookings and turnover

Overall, almost two thirds (64%) of respondents have lost over 40% of this year’s expected trade (up from 57% reported in the previous wave). The majority (39%) reported losses of between 40% and 60% of their forecasted trade and a further 21% reported losses to date of between 60% and 80% of their usual trade.

Percentage of trade lost to date



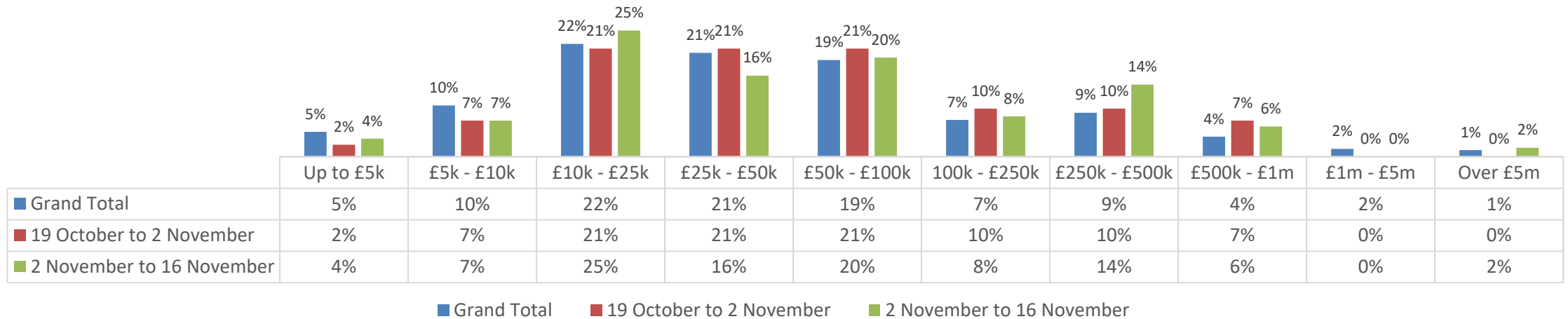
Q: If your trade has decreased what percentage of trade would you say you have lost this year? (75)



## 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 61% of all respondents. A further 22% report losses of between £100k and £500k.

How much could this mean in terms of lost turnover?

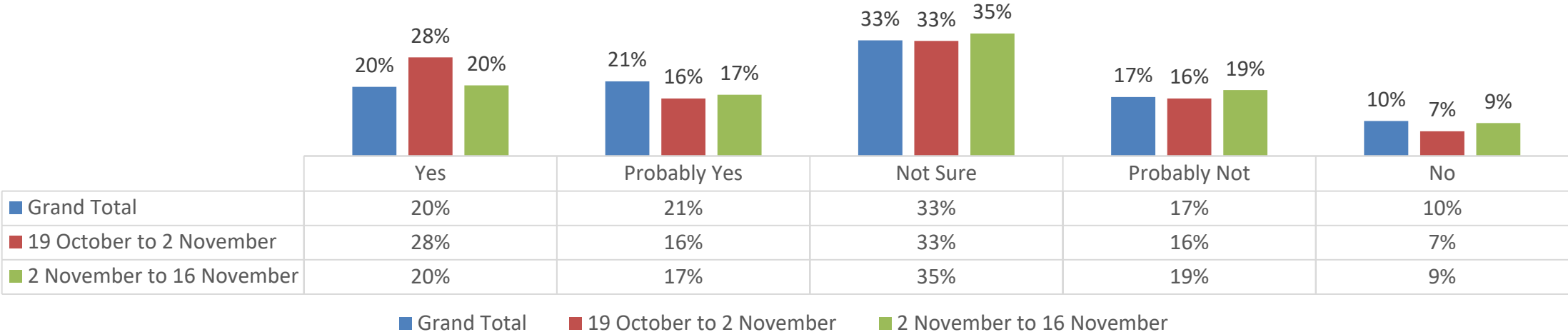


Q: Approximately how much could this mean in terms of lost turnover? (75)

Research Outputs – Business Survival

Just over a third (37%) have a positive outlook on their likelihood or surviving the next three months, down from 46% in the previous report. Just over a third (35%) are still not sure and 28% don't expect to survive longer than three months.

Business survival after THREE months in the current situation?



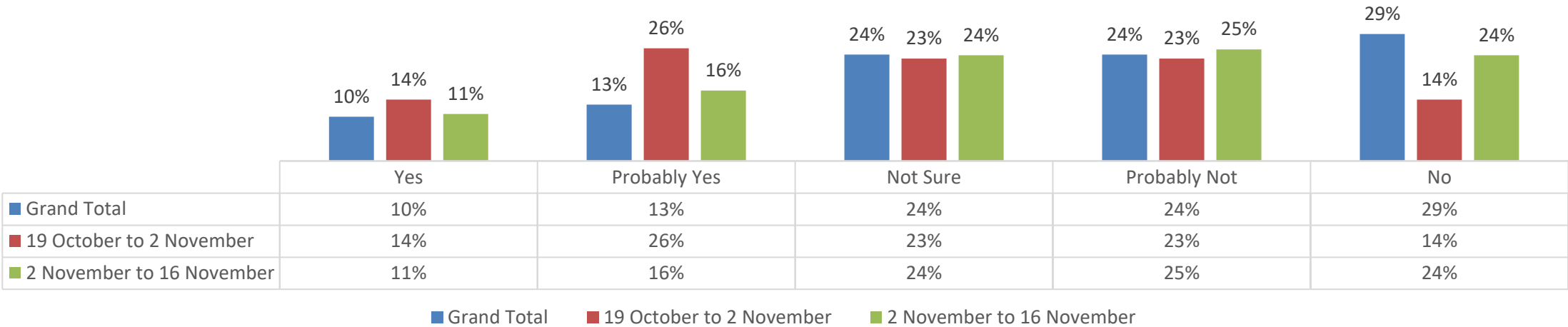
Q: Would your business survive for three months in the current situation? (75)



## Research Outputs – Business Survival

Just over a quarter (27%) are confident they will survive for six months in the current situation (down from 40%). Those ‘not sure’ about their survival after six months account for 24% of the sample. Importantly, just under half (49%) think they probably won’t survive after six months (up from 37% reported two weeks ago).

Business survival after SIX months in the current situation?



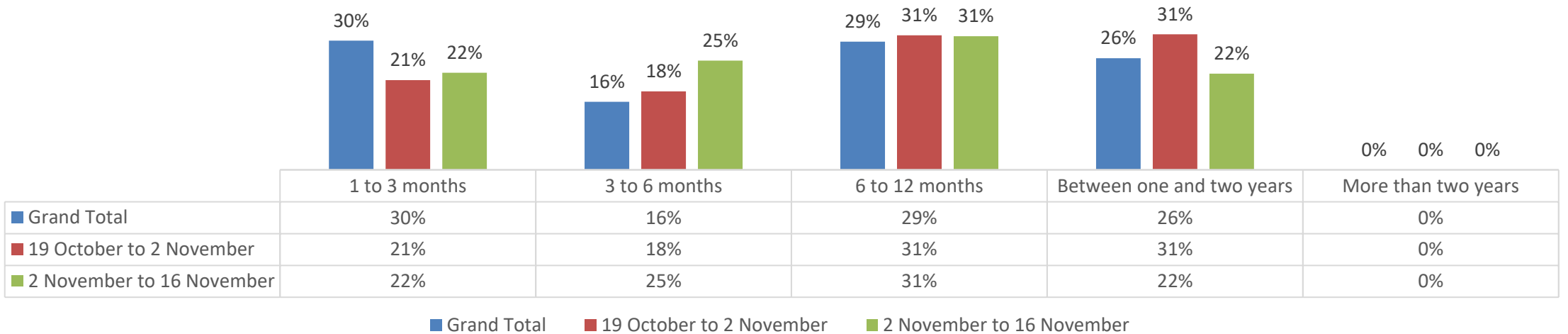
Q: Would your business survive for six months in the current situation? (75)



## Research Outputs – Business Recovery

Should trading restrictions linked to Covid-19 end today, the majority of businesses (31%) would expect to need between six months and a year to recover – unchanged since the previous wave. Those expecting to need up to 6 months account for 47% (of these, 22% think they will only need between 1 and 3 months). One in five (22%) will need between one and two years to recover.

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

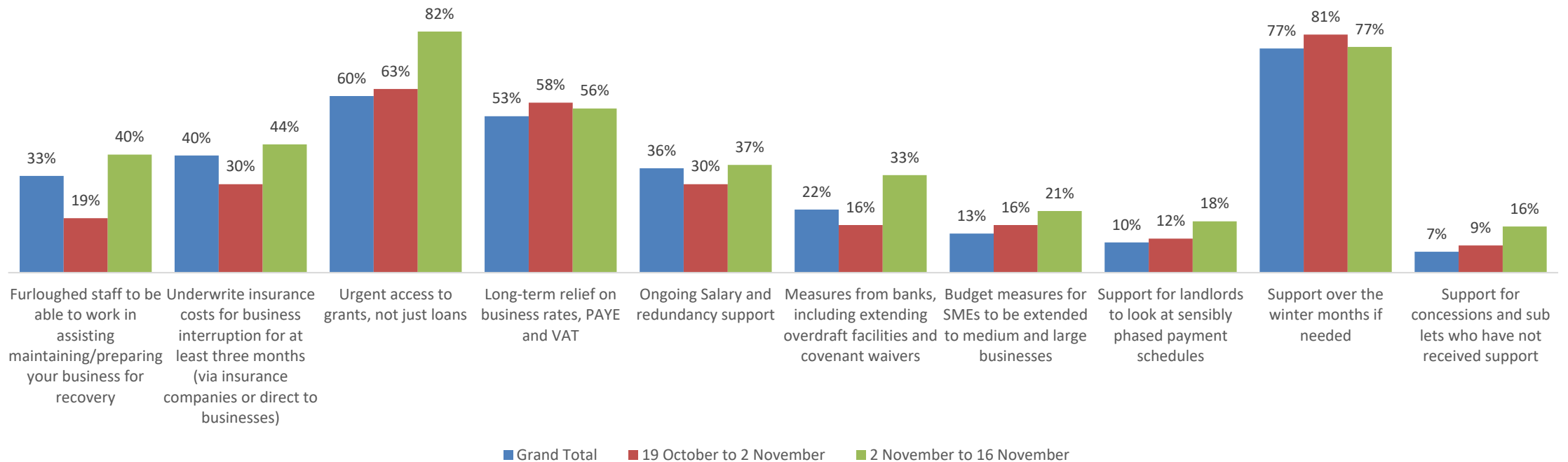


*Q: If Covid 19 and all trading restrictions were to end today, how long would you estimate it would take for your company to get back to business as usual? (76)*

## Research Outputs – Business Support

A large majority (77%) continue to say they will need support from government over the winter months. However, one of the key changes since the lockdown announcement has been the increase in the proportion of businesses requesting urgent access to grants, not just loans (up to 82% from 63% the previous week). Furthermore, the results show increases to all support measures except to the long term relief on business rates, PAYE and VAT still, which shows a marginal drop but is still important to more than half of business (56%).

Support from Government going forward



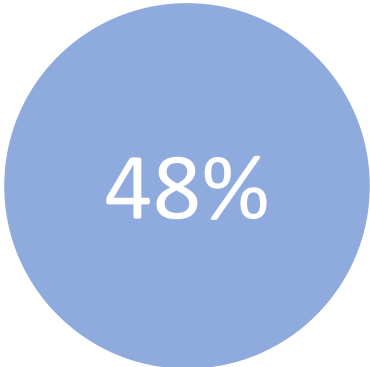
Q: What support from Government would be crucial for your business going forward? (75)



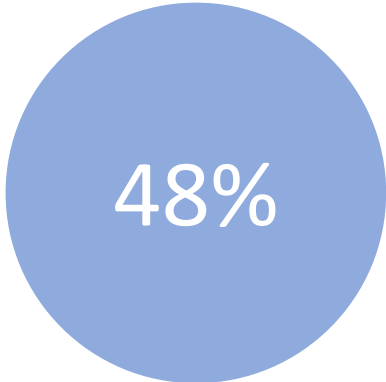
## Research Outputs – Further opinions

Respondents are currently operating at just under half (48%) of their normal capacity for this time of the year, unchanged from 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? (75)





## 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:

- There is a pessimistic mood among some businesses due to the new lockdown. Some see their Christmas trading plans may be affected by the new closures and this puts their businesses continuity plans at risk.
- There's a need for continued financial support, particularly with more grants over winter (not loans)
- A key practical request by some is free parking to visitors and residents to encourage



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



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