

# Covid-19 – Online Tourism Business Survey

Prepared for: Great Yarmouth Tourism and  
Business Improvement Area

Report 27: 16 November – 30 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, 76 in week 32 and 57 in week 33.

### 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).



## Key developments:

### **Government's COVID-19 Winter Plan**

The current national restrictions in England will end on 2 December and that the country will move back into a regional tiered approach.

The East of England will be operating under tier 2: High alert restrictions. This includes: Suffolk, Hertfordshire, Cambridgeshire, including Peterborough, Norfolk, Essex, Thurrock and Southend on Sea, Bedfordshire and Milton Keynes

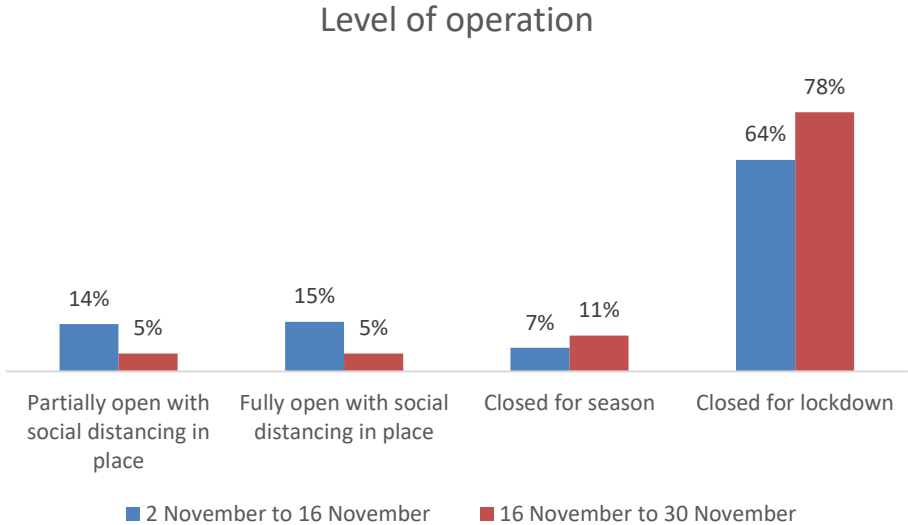
In tier 2:

- Pubs and bars must close unless they are serving substantial meals (like a full breakfast, main lunchtime or evening meal), along with accompanying drinks.
- Retailers and entertainment venues will be able to open with capacity limits and social distancing.
- Accommodation will be open.
- Spectator sport and business events will resume inside and outside with tight capacity limits and social distancing, providing more consistency with indoor performances in theatres and concert halls.



## Research Outputs – Business Profile

Just over three quarters of businesses (78%) had to close down temporarily due to the new lockdown (up from 64%). A further 11% decided to close down for the season. The remaining 10% are still open with social distance measure is place. Of these, 5% are fully open and 5% only partially open.

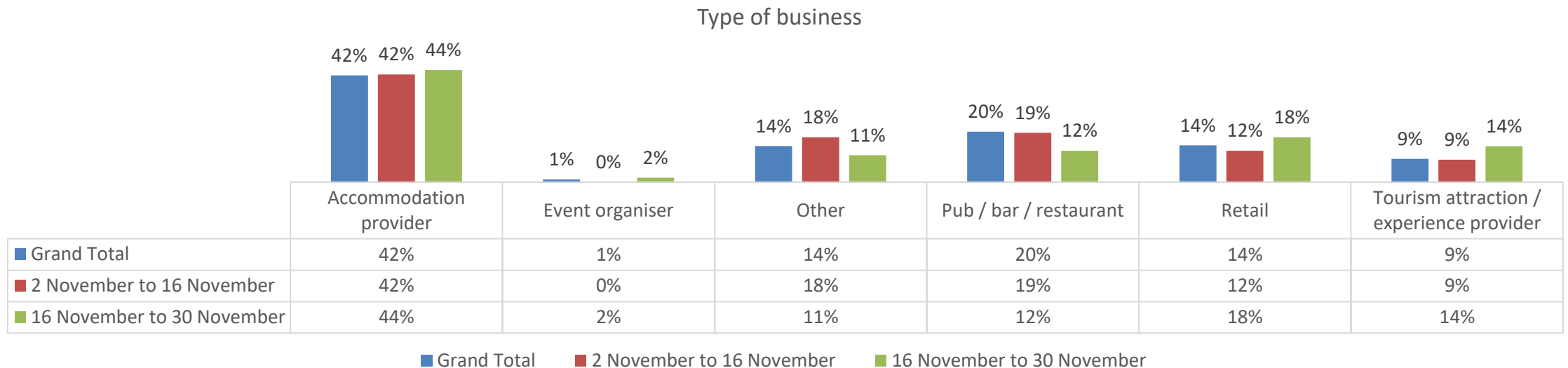


Q: What is the current status of your business? (57)



## Research Outputs – Business Profile

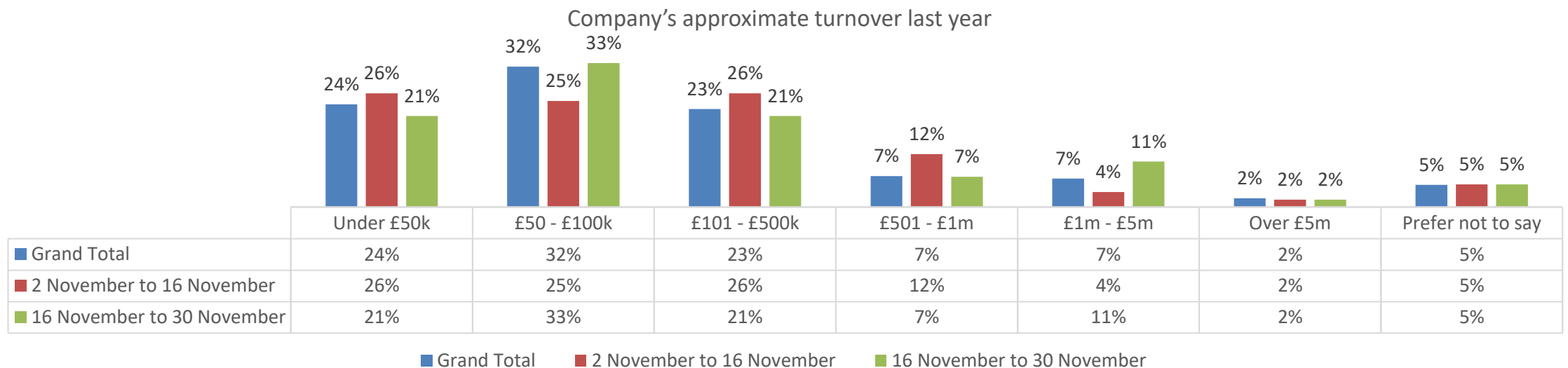
The latest sample shows a marginal increase in the proportion of accommodation providers (up 2% on the last report, to 44%) and an increase in the proportion of retail (18%) and tourist attractions (14%) taking part (up from 12% and 9% respectively).



Q: What type of business do you run? (57)

## Research Outputs – Business Profile

Businesses with turnover up to £100k accounted for just over half (54%) of the total sample of participants. There was a 5% decrease in the proportion of businesses with turnovers under £50k, down to 21%. Those reporting turnovers of £1m to £5m accounted for 11%, up from 4% in the previous wave. Overall, three quarters (75%) of all responses have been from SMEs (turnover up to £500k).

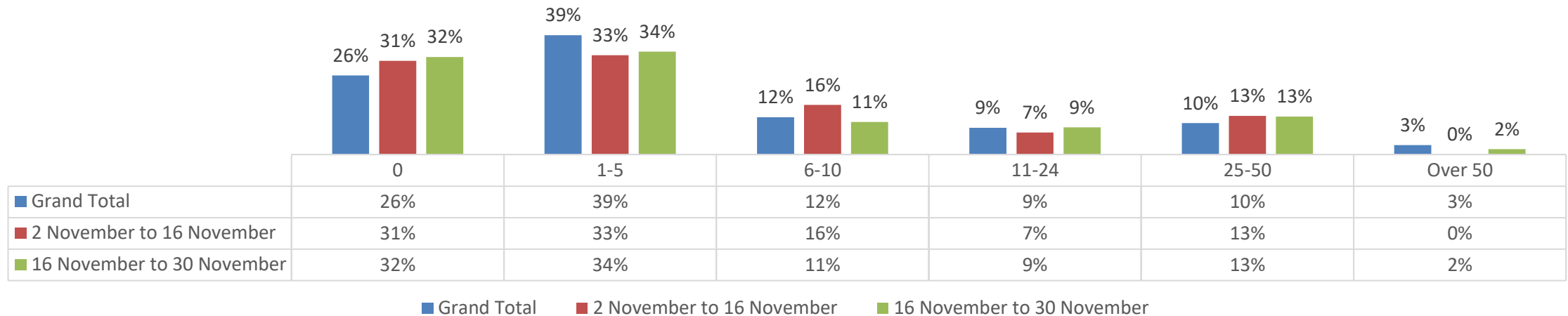


Q: What was your company's approximate turnover last year? (57)

## Research Outputs – Staff and employment changes

There was a 1% increase in the proportion of businesses that don't employ anyone to 32%. The proportion of those employing between 1-5 people was also marginally up to 34%. Those employing between 6 and 10 people accounted for 11%, down from 16% in the previous wave. Medium and larger establishments showed some marginal changes – those employing 11-24 people accounted for 9% (up from 7% in the previous wave), the 25-50 group was unchanged, with 2% of the sample being businesses with over 50 employees.

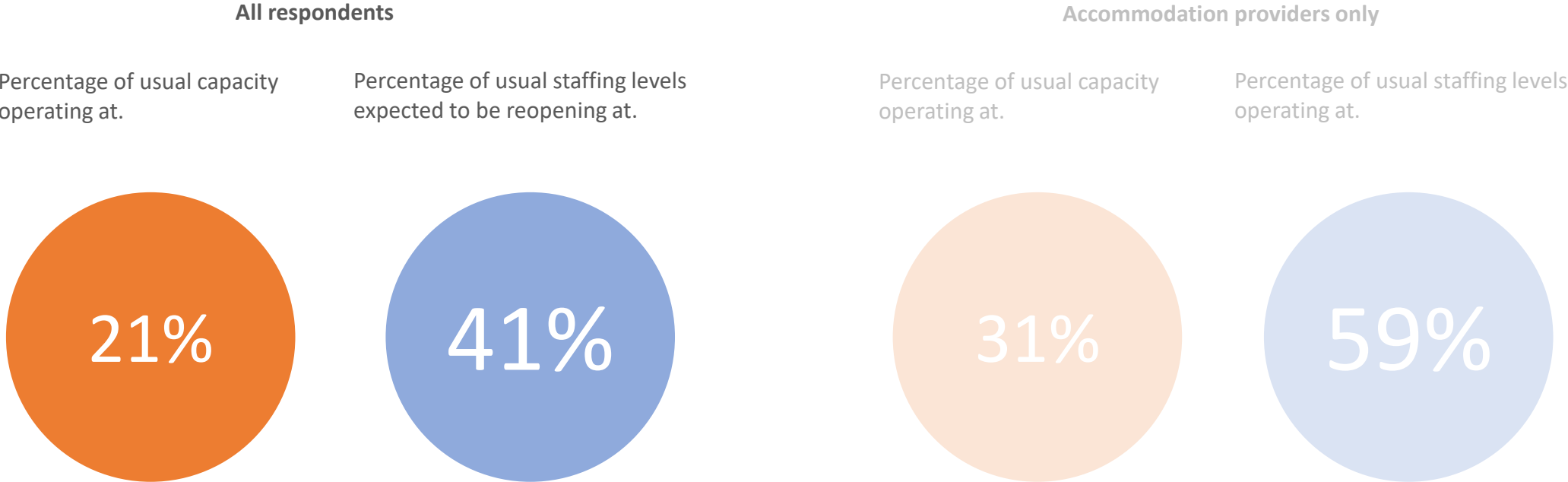
Staff employed or expected to employ before Covid 19



Q: How many staff did you employ or expected to employ before the start of the Covid 19 crisis? (57)

## Research Outputs – Staff and employment changes

On average, businesses are operating at 21% of normal capacity. They are using 41% of their usual staff. Note that due to the current lockdown measures the sample for accommodation providers currently trading was too small to generate meaningful results.



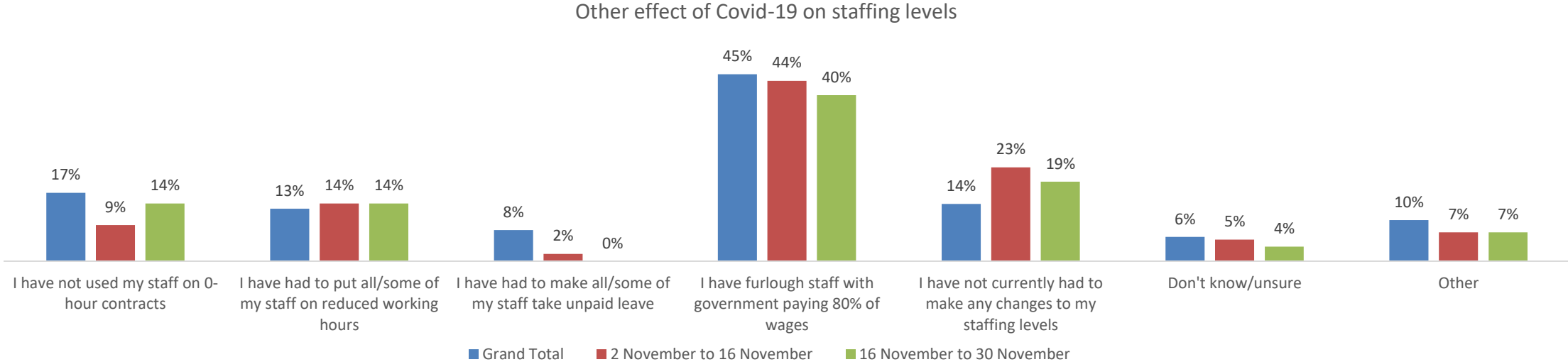
*Q: If you have reopened, approximately what percentage of your usual capacity are you operating at? Q: Approximately what percentage of your usual staffing levels are you operating at? (57, 57)*





## Research Outputs – Staff and employment changes

The new lockdown restrictions and in particular the extension of the furlough scheme until March 2021 has resulted in two in five respondents (40%) saying they put staff on furlough (down from 44% in the previous wave). Only 14% had put some or all their staff on reduced working ours, (unchanged from two weeks ago). Almost one in five (19%) said they had not made any changes to staff levels (down from 23% in the previous wave).

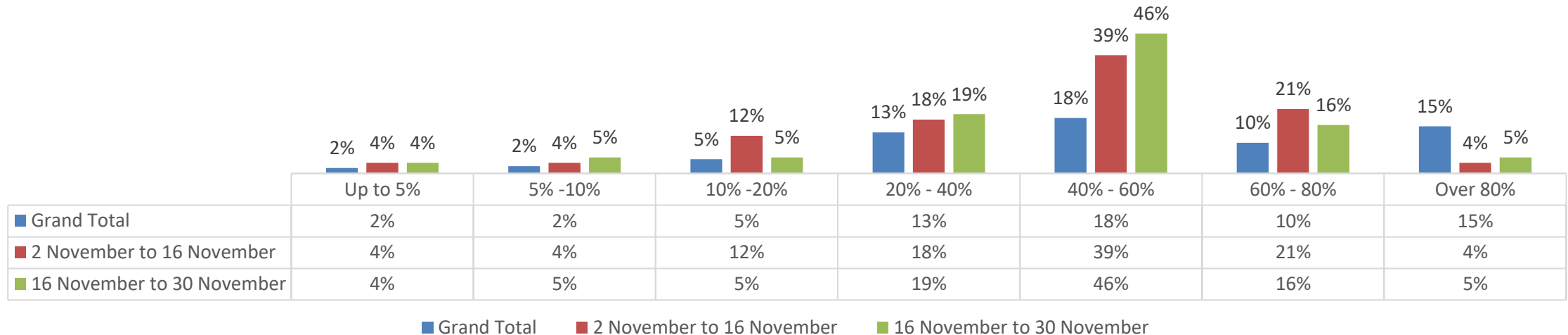


Q: What other effect has Covid-19 had on your staffing levels to date? (56)

## Research Outputs – Impact on bookings and turnover

Overall, a third (33%) of respondents have lost up to 40% of this year’s expected trade (down from 38% reported in the previous wave). The majority (46%) reported losses of between 40% and 60% of their forecasted trade (up from 39% reported in the previous wave) and a further 21% reported losses to date of over 60% of their usual trade.

Percentage of trade lost to date

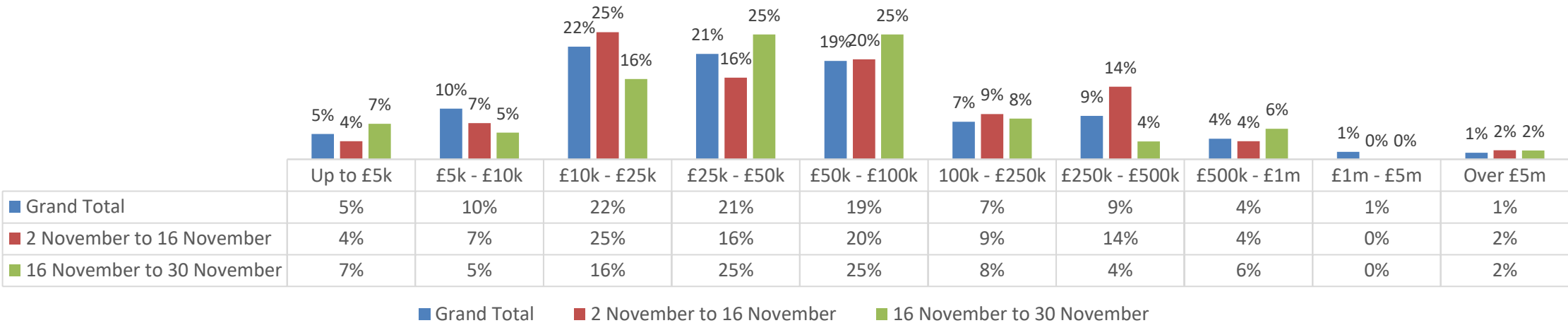


Q: If your trade has decreased what percentage of trade would you say you have lost this year? (57)

## 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 78% of all respondents. A further 12% report losses of between £100k and £500k and 6% lost up to £1m.

How much could this mean in terms of lost turnover?



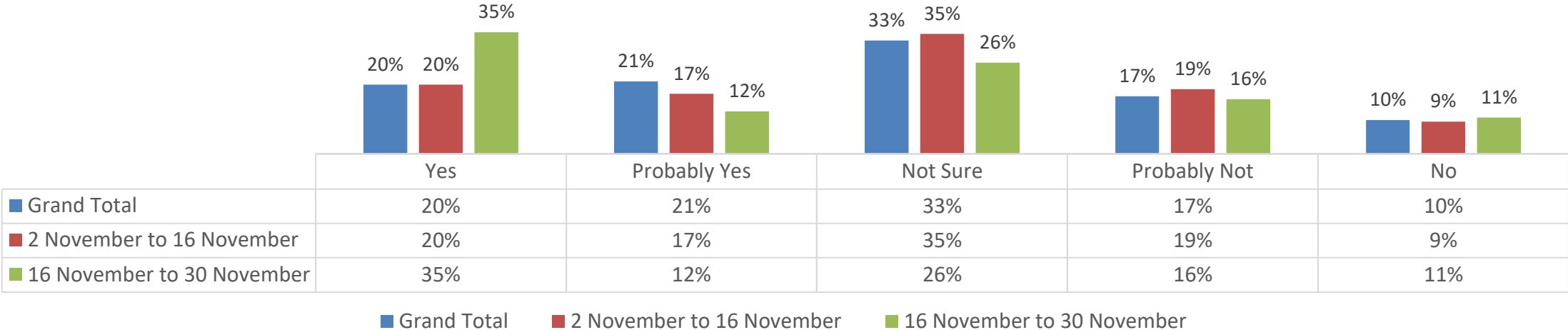
Q: Approximately how much could this mean in terms of lost turnover? (57)



Research Outputs – Business Survival

Just under half (47%) have a positive outlook on their likelihood or surviving the next three months, up from 37% in the previous report. Just over a quarter (26%) are still not sure and 27% don't expect to survive longer than three months.

Business survival after THREE months in the current situation?

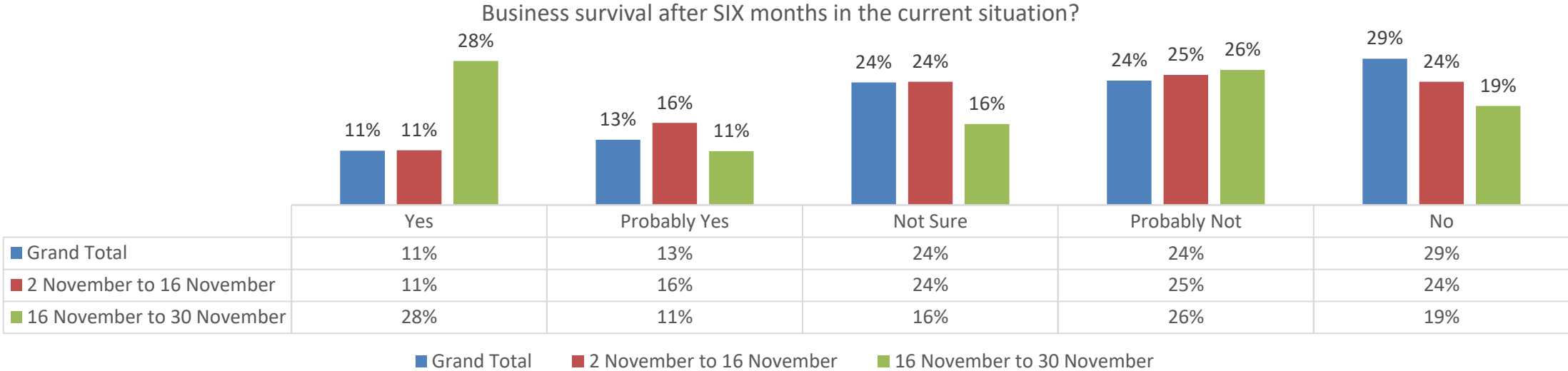


Q: Would your business survive for three months in the current situation? (57)



Research Outputs – Business Survival

Just under two in five (39%) are confident they will survive for six months in the current situation (up from 27%). Those ‘not sure’ about their survival after six months account for 16% of the sample. Importantly, less than half (45%) think they probably won’t survive after six months (down from 49% reported two weeks ago).



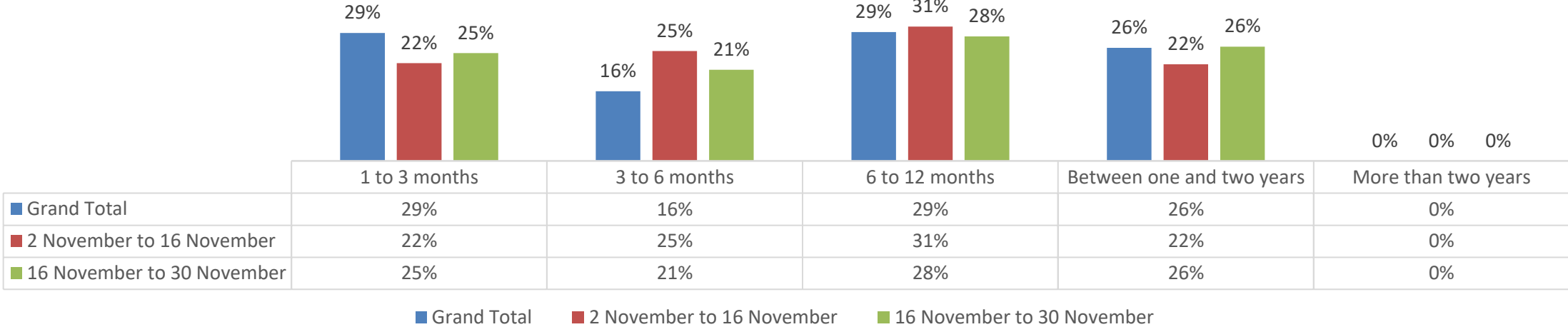
Q: Would your business survive for six months in the current situation? (57)



## Research Outputs – Business Recovery

Should trading restrictions linked to Covid-19 end today, the majority of businesses (28%) would expect to need between six months and a year to recover. However, note that the results are very evenly spread. Those expecting to need up to 6 months account for 46% and those expecting to need longer than 6 months account for 54%.

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



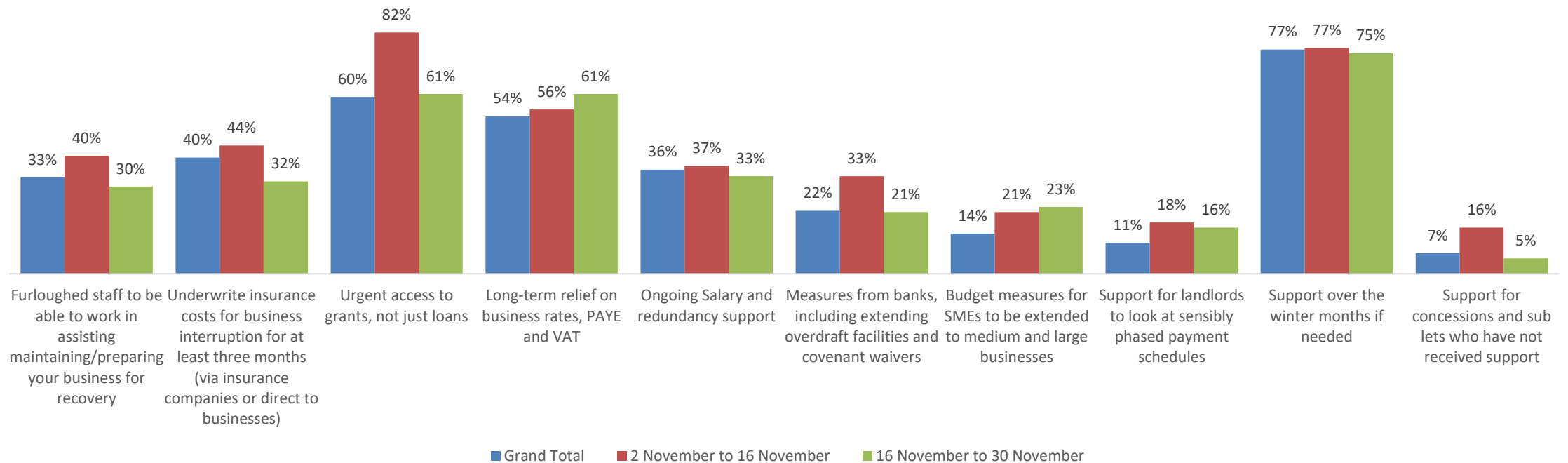
*Q: If Covid 19 and all trading restrictions were to end today, how long would you estimate it would take for your company to get back to business as usual? (55)*



## Research Outputs – Business Support

A large majority (75%) continue to say they will need support from government over the winter months. One key effects of the current lockdown (as reported in the previous wave) was an increase in the proportion of businesses requesting urgent access to grants, not just loans (peaking at 82%). This has now reverted back to 61%, a similar level to the series average (60%). Furthermore, the results show an increase in those requesting long term relief on business rates, PAYE and VAT (61% up from 56%).

Support from Government going forward

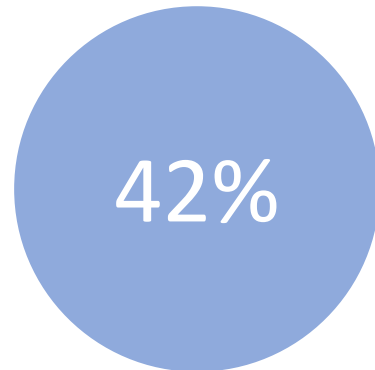


Q: What support from Government would be crucial for your business going forward? (55)

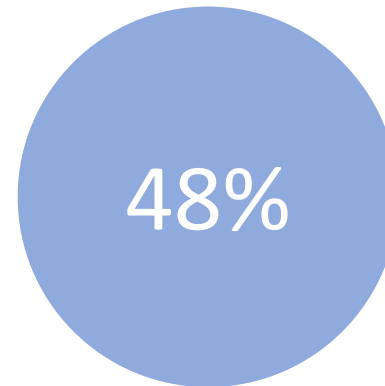
## Research Outputs – Further opinions

Respondents are currently operating at 42% of their normal capacity for this time of the year, down from 48% 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? (55)



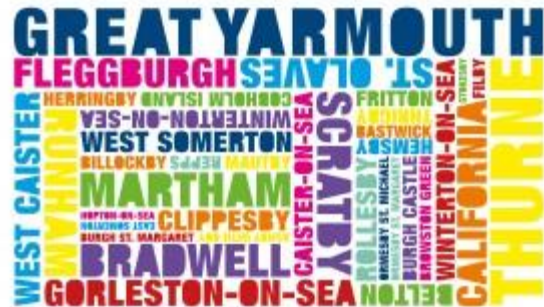
## Research Outputs – Further opinions

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 feel the stop-start trading condition are seriously damaging their ability to stay afloat until next season.
- Note that the vast majority of the responses included in the report were received before the latest announcement concerning the Government's COVID-19 Winter Plan.
- The new tier system will allow many businesses to start trading again after 2 December. The impact of the new regulations on their short and mid term trading conditions should be captured in the next wave of the business survey.



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



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