

# **Covid-19 Visitor Economy Recovery Planning Business Survey**

Nottingham & Nottinghamshire

## Method Statement

This survey was conducted by **Visit Nottinghamshire** and **Nottinghamshire County Council**. The indicators and analysis presented are based on responses from tourism/hospitality businesses, across the city and county. (Nottingham and Nottinghamshire). Capturing responses on how their turnover, workforce, prices, trade and business resilience have been affected in the current pandemic. It also looks at access to funding and forecasts future sentiment.

The survey is mainly a quantitative data exercise, however, in the survey there were spaces for respondents to give qualitative information too.

The survey will form part of the wider D2N2 Visitor Economy Recovery Plan and will also feed into all local and District Councils, VisitBritain, and all associated Partners and Stakeholders.

**The survey ran from 1<sup>st</sup> – 16<sup>th</sup> June 2020 and received 147 responses.**

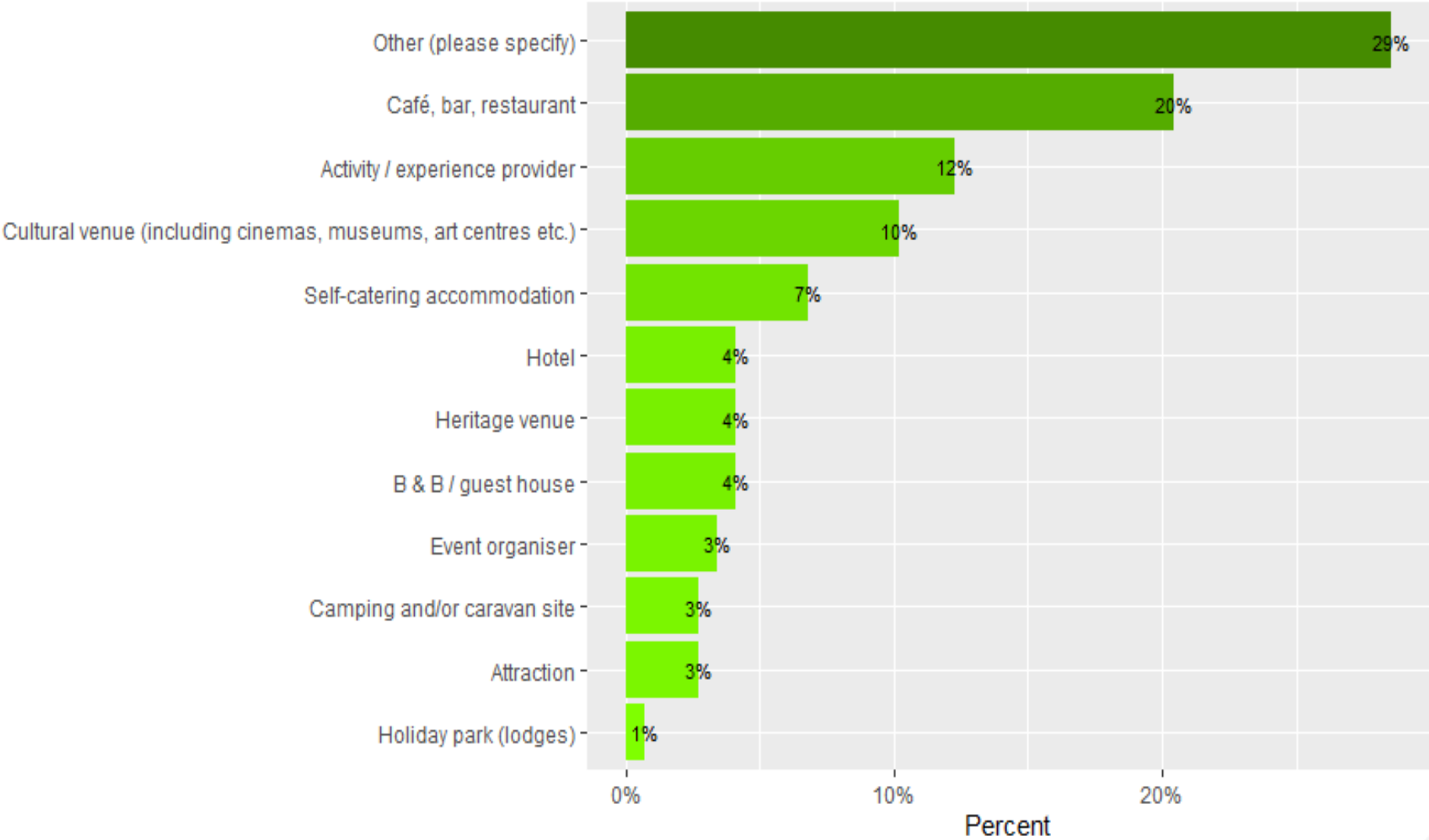
**The survey has a population of 147 businesses, with all respondents answering every question between the dates 1/6/2020 to 16/6/2020.**

Brief summary of observations:

- 15% of surveyed businesses unlikely to survive following the end of the current furlough/lockdown timeline (29.5% if restrictions aren't lifted by December)
- Moving on from Covid-19, the modal (70% of respondents) preferred recovery initiative is for a marketing campaign to improve 'consumer confidence'
- Overwhelming amount of suggestions for a focus on "staycation"; especially focusing on **day visitors** that may even be local to Nottinghamshire.



Q1: What is your main business activity?

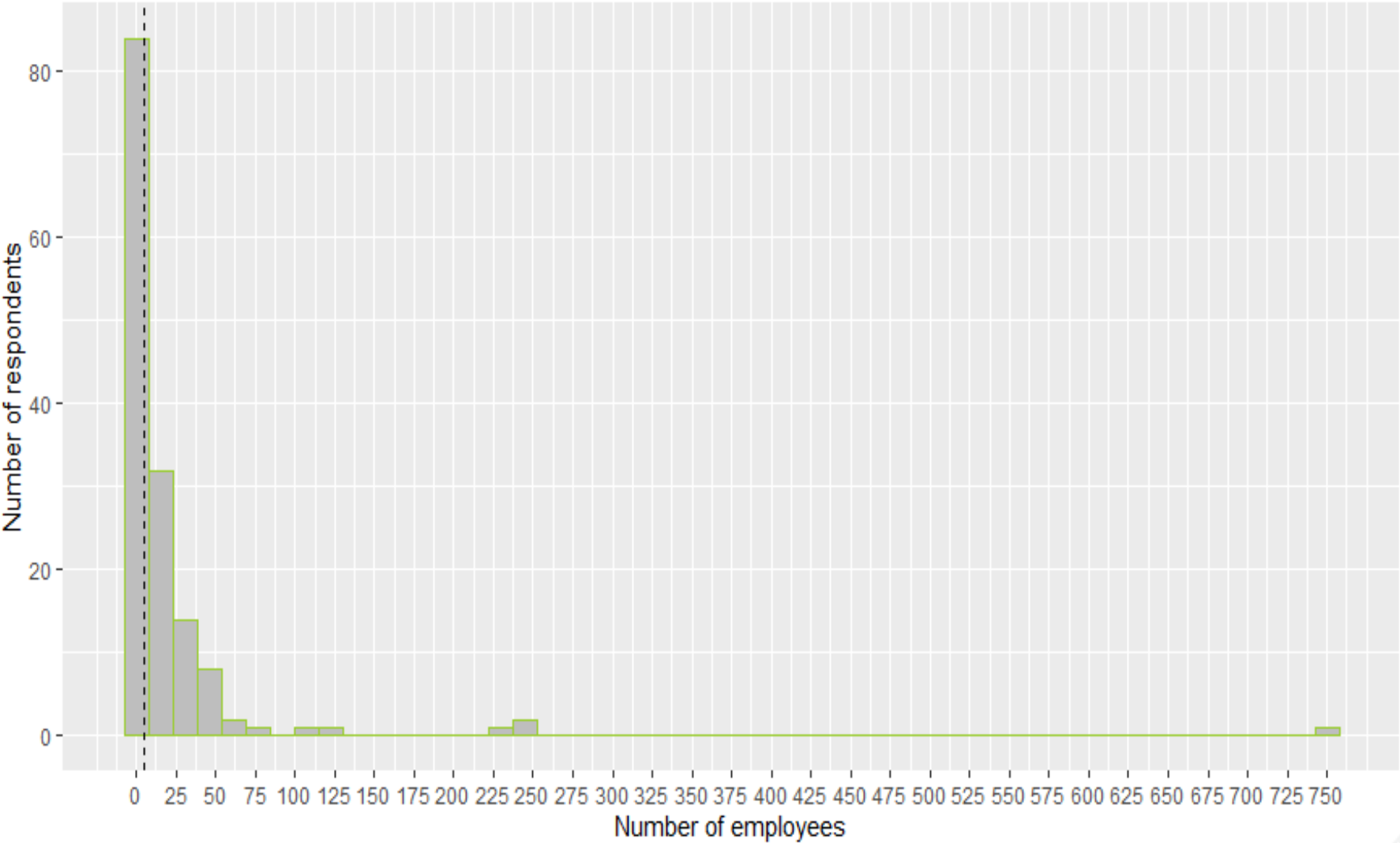


- “Other” includes:
- 6 Tourism businesses (3 travel agents)
  - 3 Venues
  - 2 Agricultural
  - 2 Traders
  - 3 Outdoor food services

Rest unique miscellaneous  
(e.g. 1 Drama company/1 Accountant)



Q2: Including yourself, how many people are employed in your business?



Summary statistics:

Minimum: 0

LQR: 2

Mode: 2 (count of 21 and 14% of all businesses)

**Median (dotted line): 5**

Mean: 22.56

UQR: 15

Mode: 2 (count of 21 and 14% of all businesses)

Max: 750

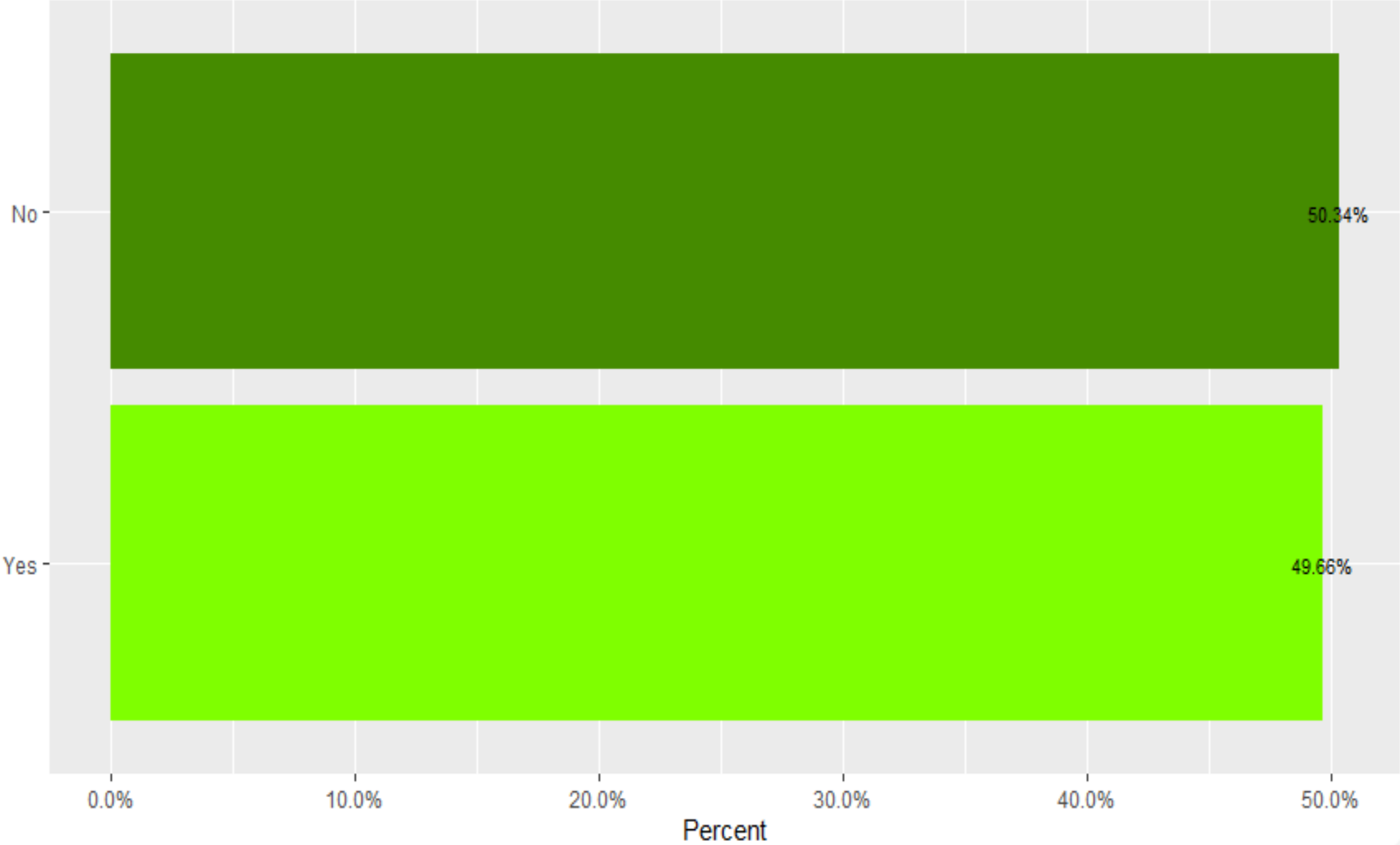
Notes:

Includes all volunteers and part-time staff.

*Appropriate measure of central tendency highlighted in **bold***



Q3: Would you consider yourself a rural business?

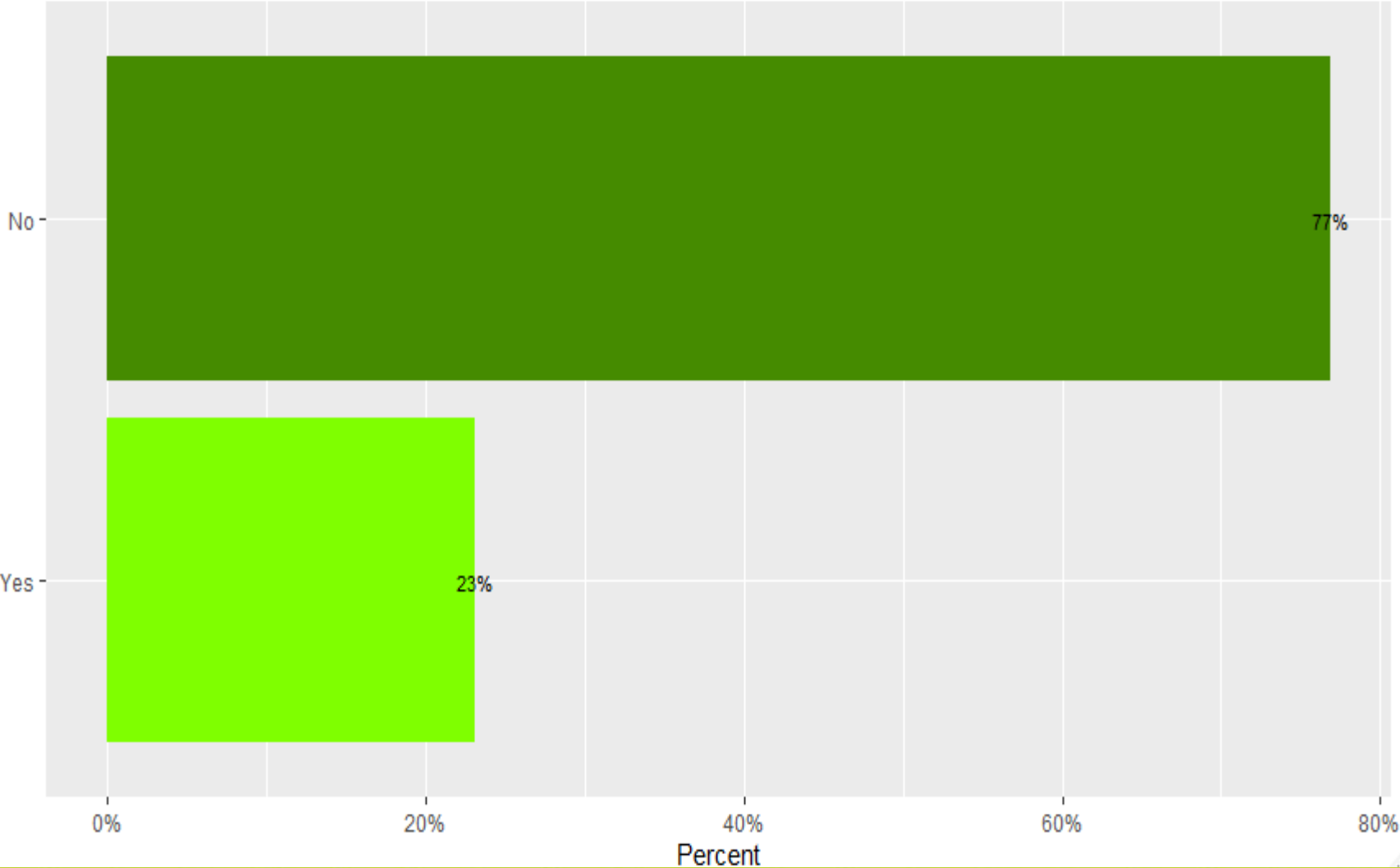


While this isn't explicitly mentioned throughout the survey, a reminder that approximately 50% of the population in the survey consider themselves to be a rural business.





Q4: Are you part of a diversified company?

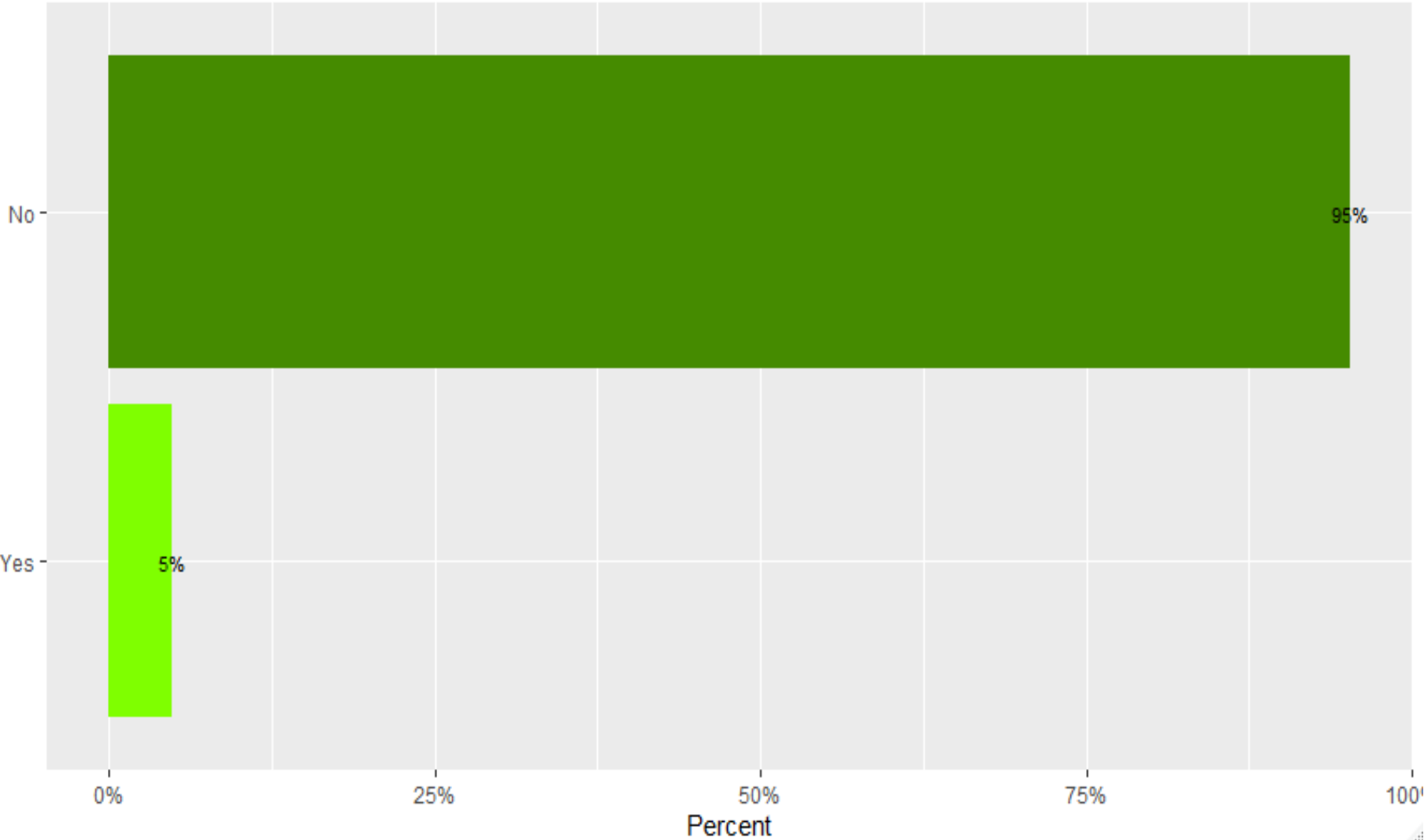


A strong majority of the population (73% or 113/147) is not part of a diversified company.

Only 34 businesses in the population are self-reportedly 'diversified'.



Q5: Are you part of a chain company?



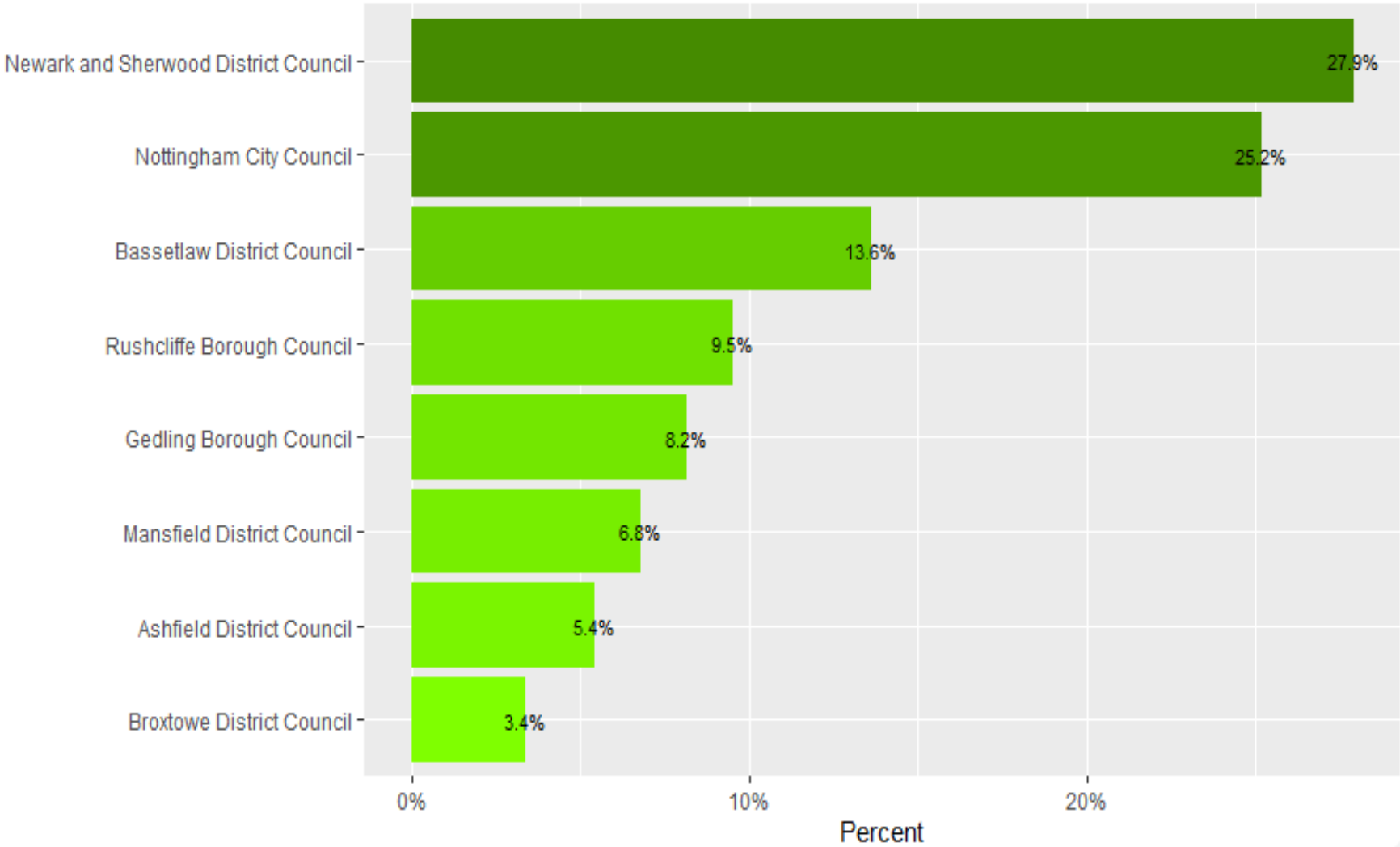
An even stronger majority of the population (95% or 140/147) is not part of a diversified company.

Only 7 businesses in the population are part of a chain company.





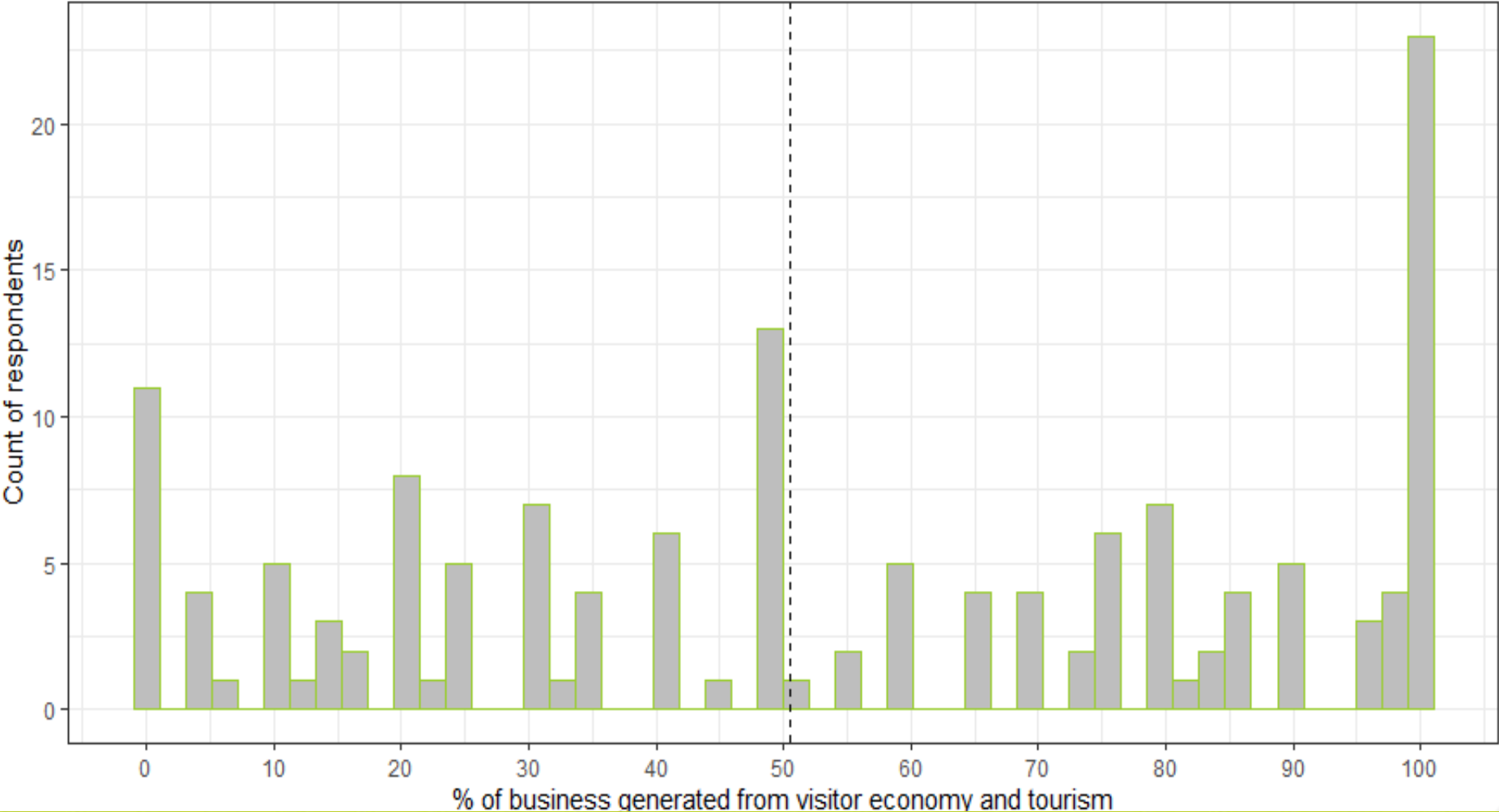
Q6: Which Local Authority is your business located in?



The modal District Council (Newark and Sherwood) is actually the only council cited within the latter questions. Positive responses praising their assistance in aiding two businesses with applying for grants



Q7: Approximately what percentage of your business is generated from the visitor economy and tourism?

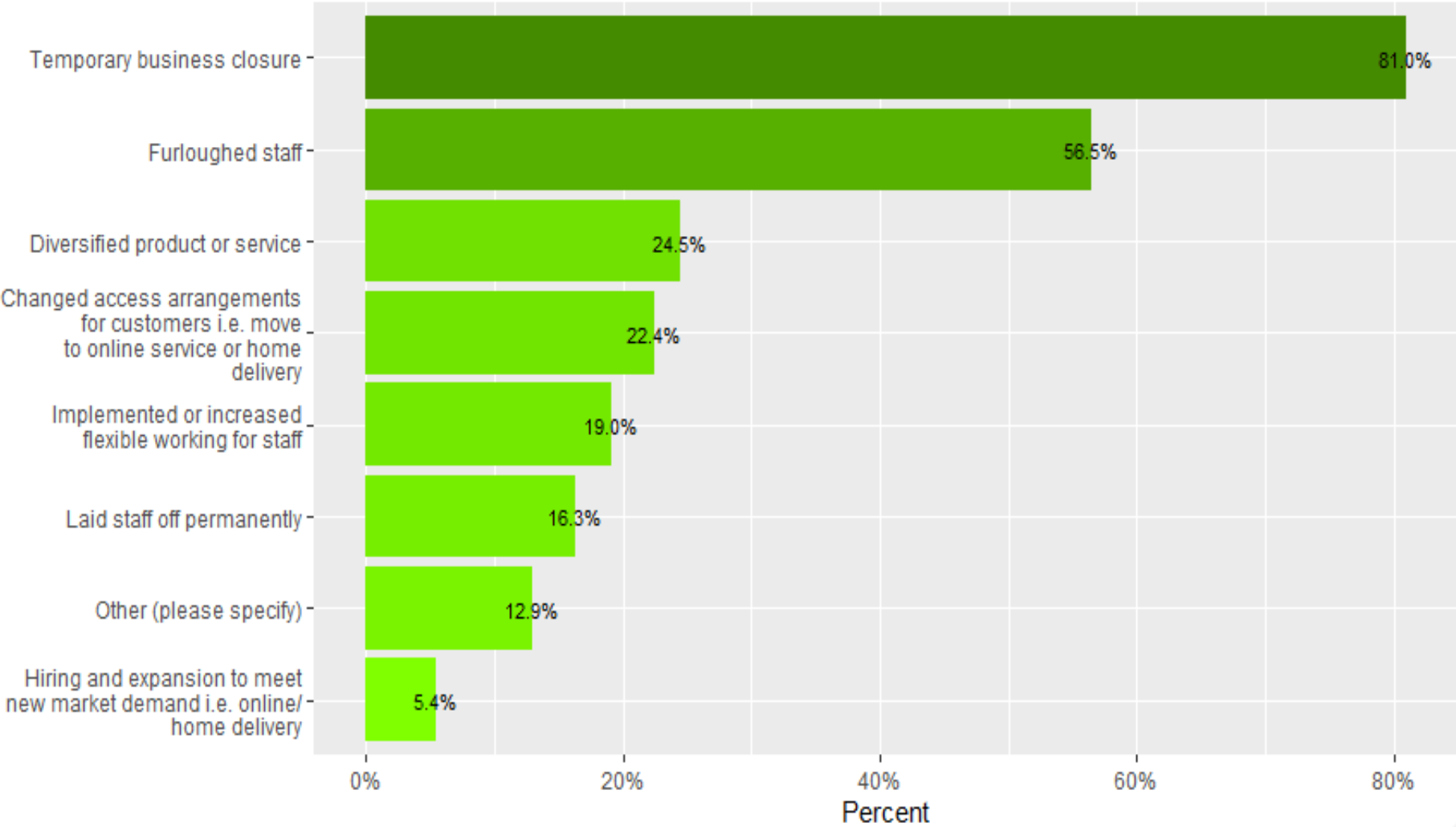


Summary statistics:  
Minimum: 0%  
LQR: 25%  
**Median (dotted line): 51%**  
Mean: 54.5%  
UQR: 85%  
Mode: 100% (count of 21)

*Appropriate measure of central tendency highlighted in **bold***



Q8: Are you taking any contingency measures to mitigate the impact of Covid-19 on your business? Tick all relevant options.



“Other” includes:  
2 respondents continuing with work without any income.

1 respondent had already re-opened with stricter measures

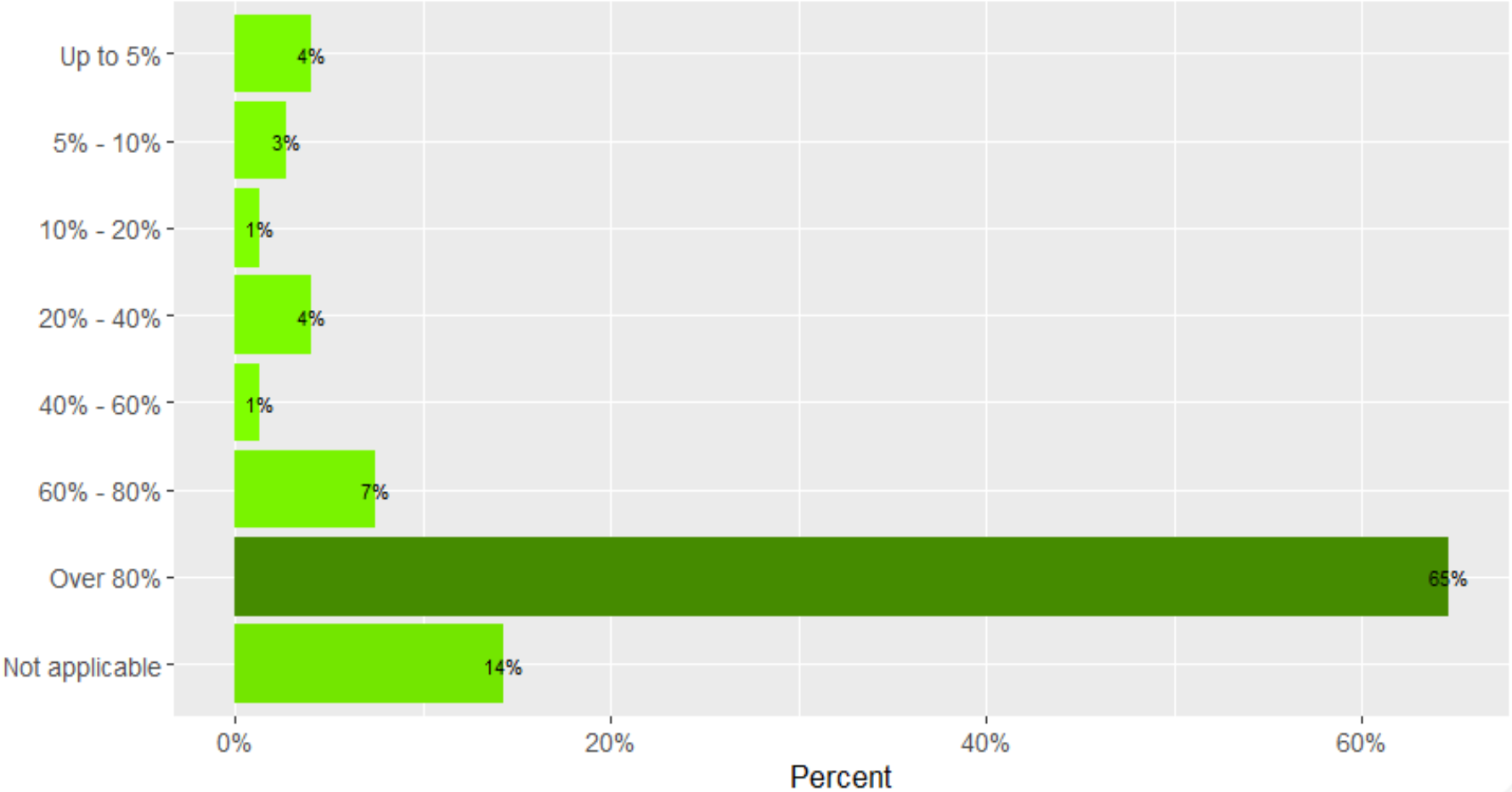
2 respondents specifically diversifying into online teaching.

3 respondents strictly working from home.

2 food services became “take away only”.



Q9:What percentage of cancellations / postponements /refunds have there been to bookings because of Covid-19?

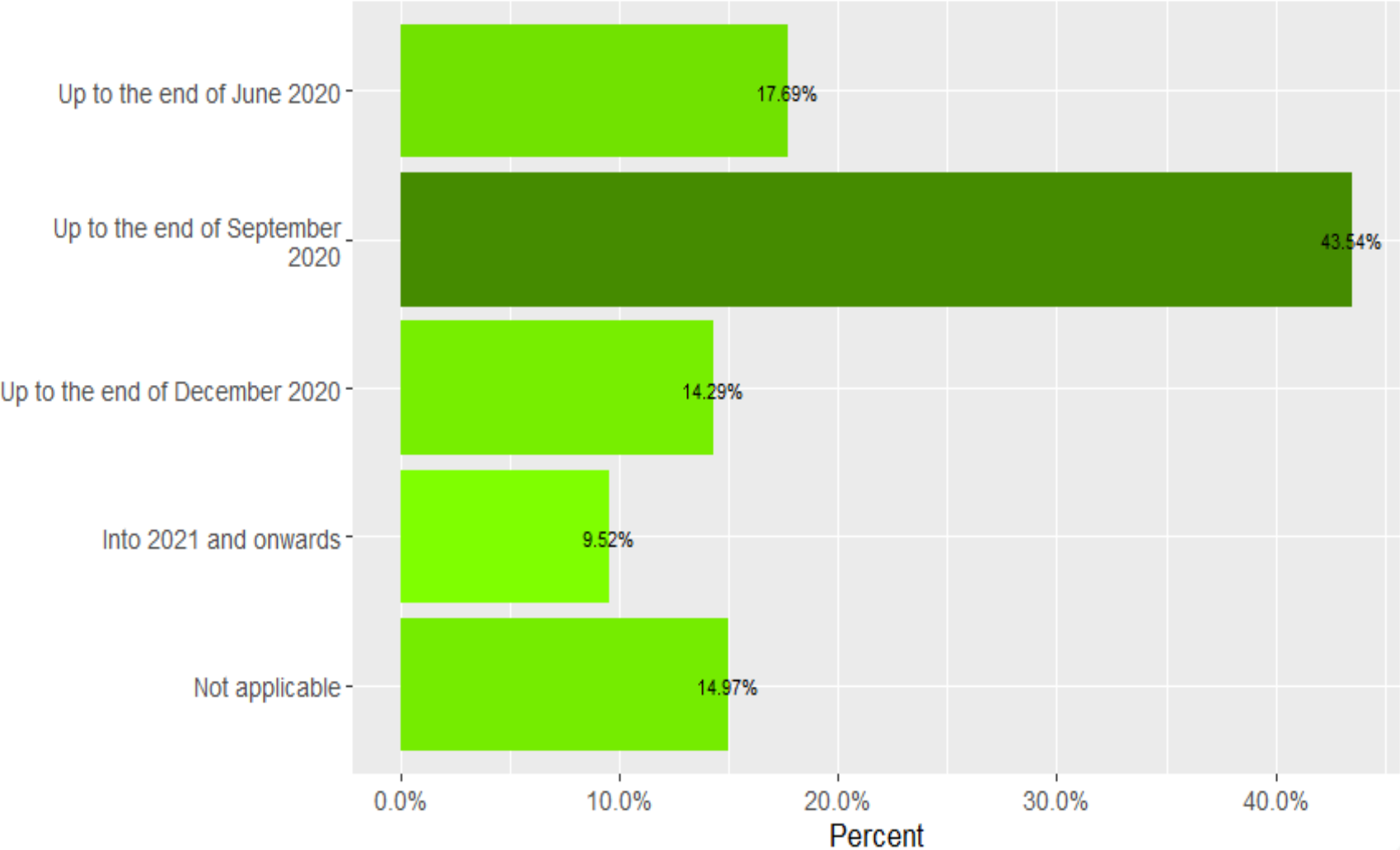


Clear majority (65% or 95/147) of businesses within the population suffering a loss, of over 80% in bookings.

If removing the 'Not Applicable' responses this results in 75% (95/126) of businesses in the population losing more than 80% in bookings



Q10:How far ahead are bookings being changed or cancelled?

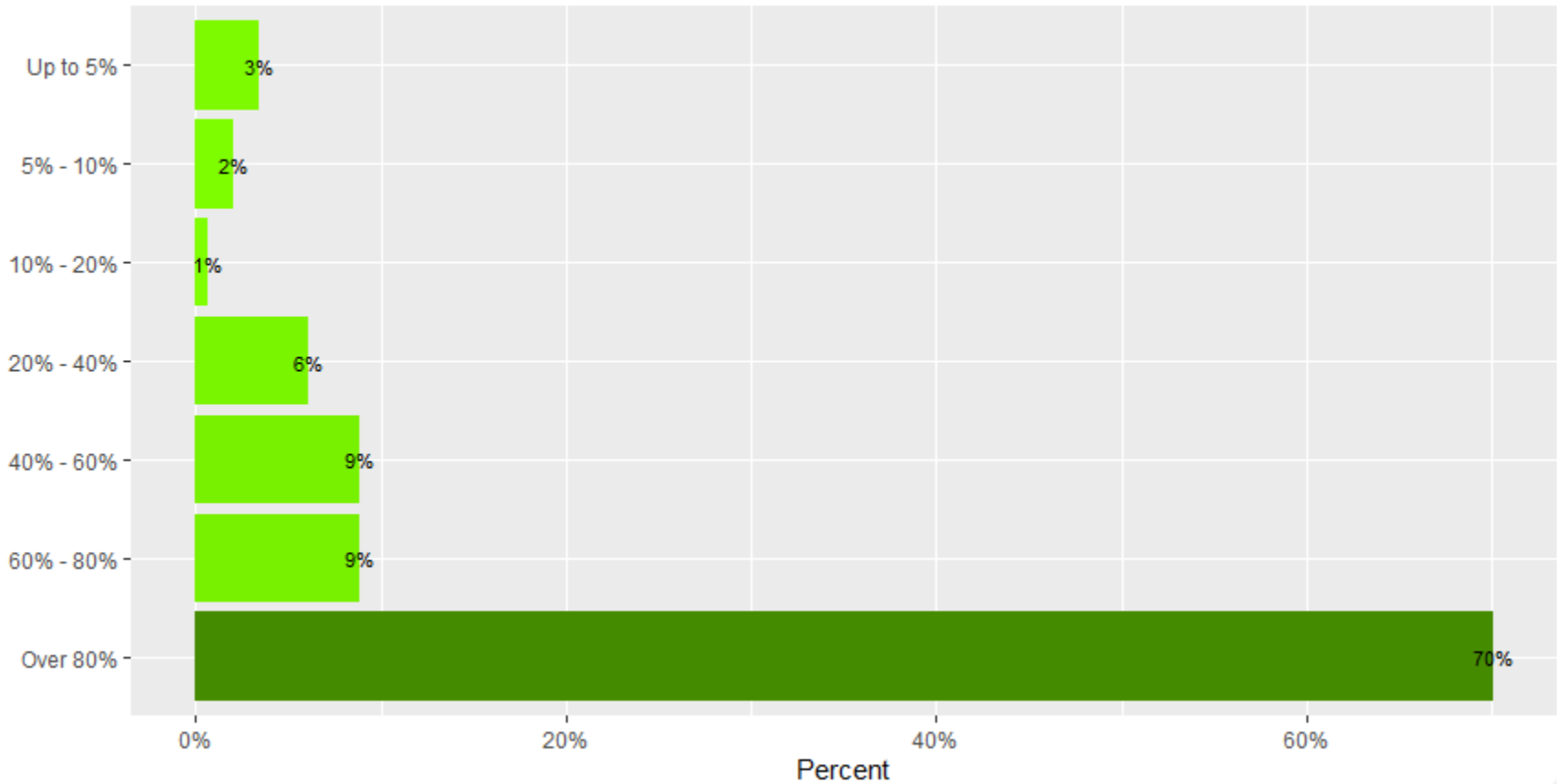


A majority of the population (61% or 95/147) have only had their bookings cancelled until the end of December.

Nonetheless, the lasting effect of Covid-19 is already apparent if 9.5% of the population have already lost revenue for 2021



Q11: What percentage of trade would you say you have lost to date due to Coronavirus?



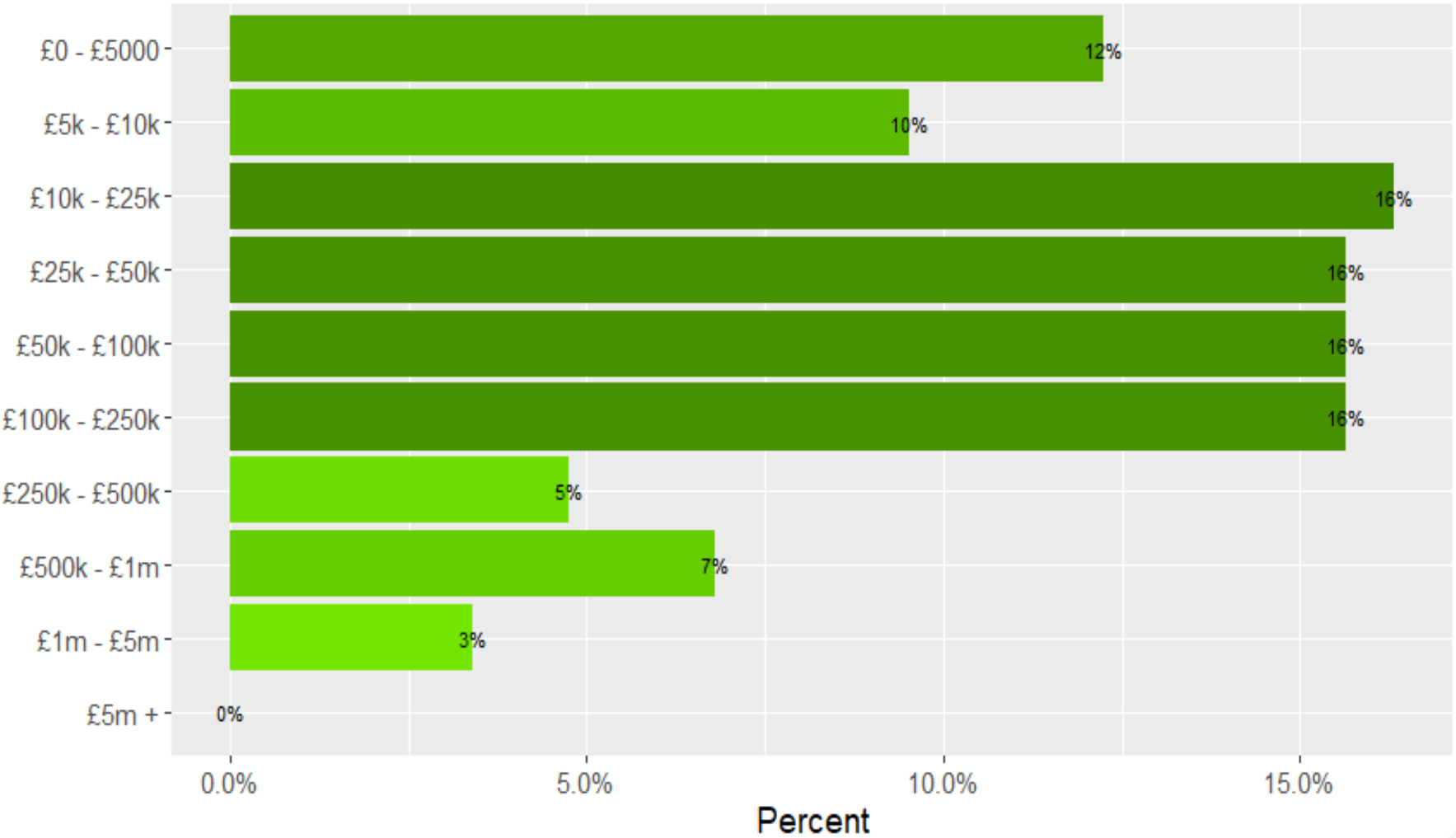
Significant majority (70% or 103/147) of the surveyed businesses report have lost more than 80% of trade due to the Coronavirus.

Only 3% (5/147) of the population has only had <5% of their trade lost.





Q12: Approximately how much could this mean in terms of lost turnover?

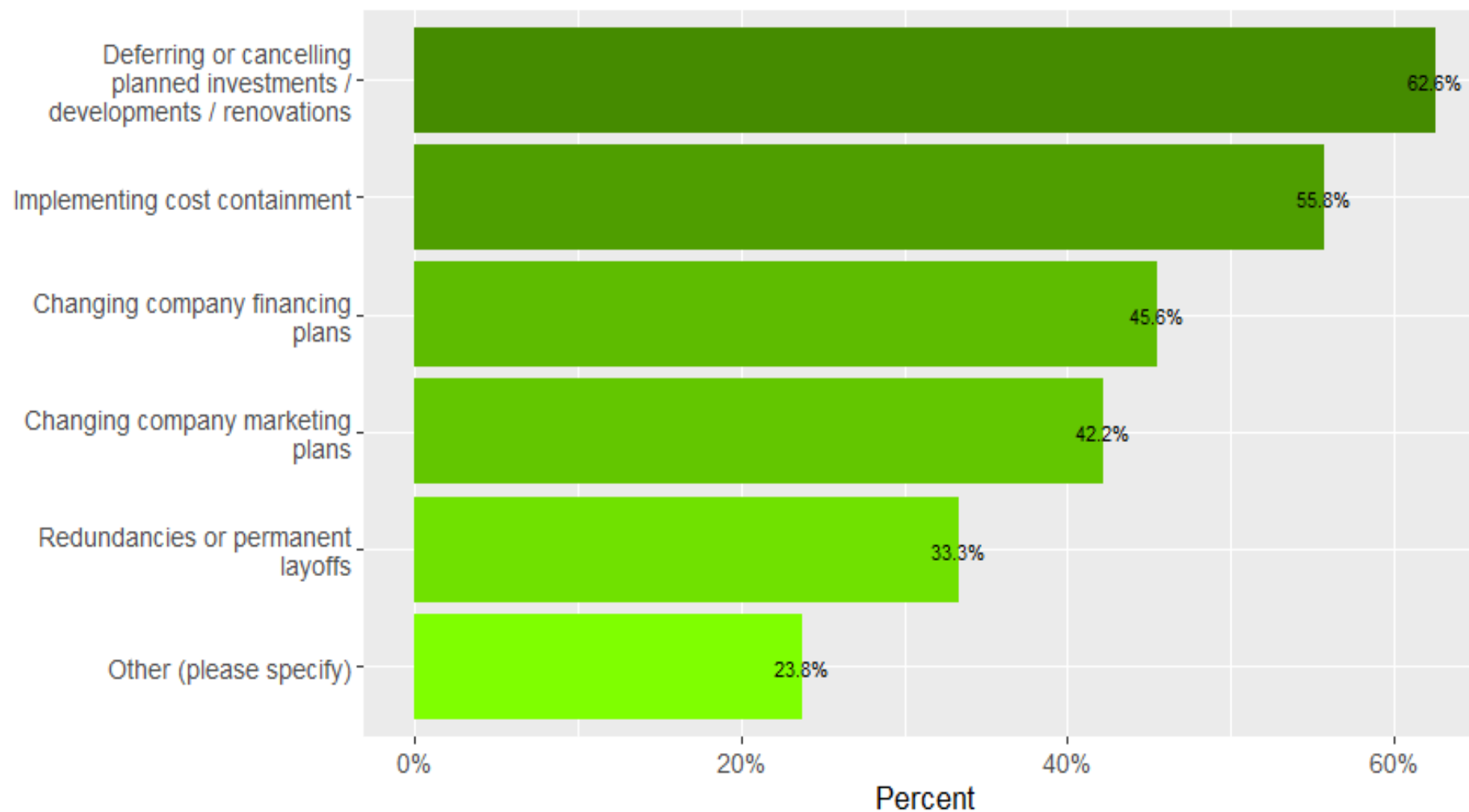


The mode loss of turnover is £10k - £25k (24/147 responses, while it is still 16% the brackets from 25-250k all have 23/147 responses each).

Approximate losses for the population:  
Total of lowest possible losses: £16,085,000  
Total of median possible losses: £32,307,500  
Total of maximum possible losses: £48,530,000



Q13: Which of the following financial actions is your company considering as a result of Covid-19? Tick all relevant options.



“Other” includes:  
11 closures (7.5% of all respondents)

2 businesses delaying hiring new staff.

3 businesses ‘restructuring’

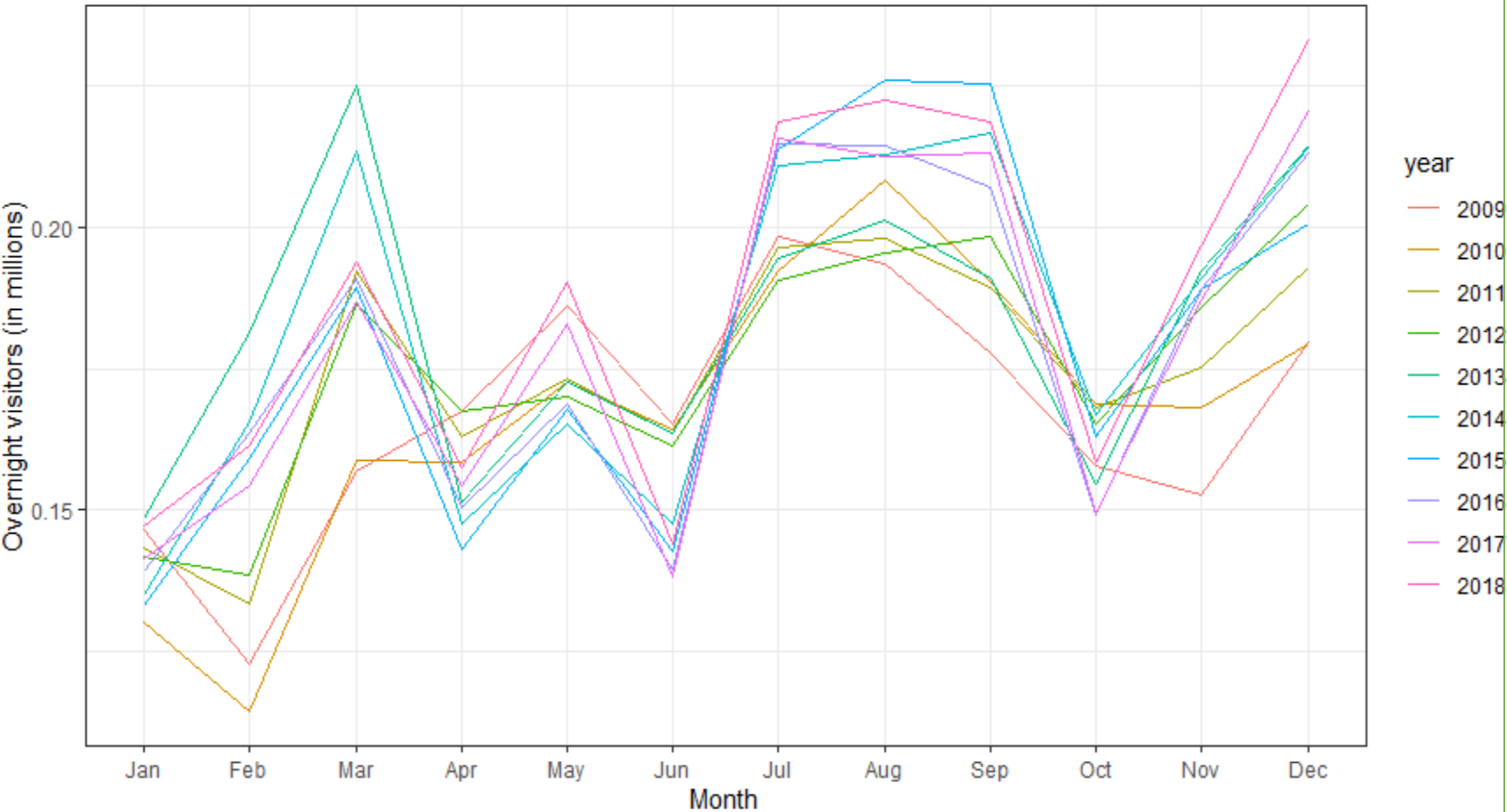
1 business has not been affected at all.

2 businesses pursuing rescue loans



Q13: ‘Which financial actions are you considering as a result of Covid?’ more “other” responses.

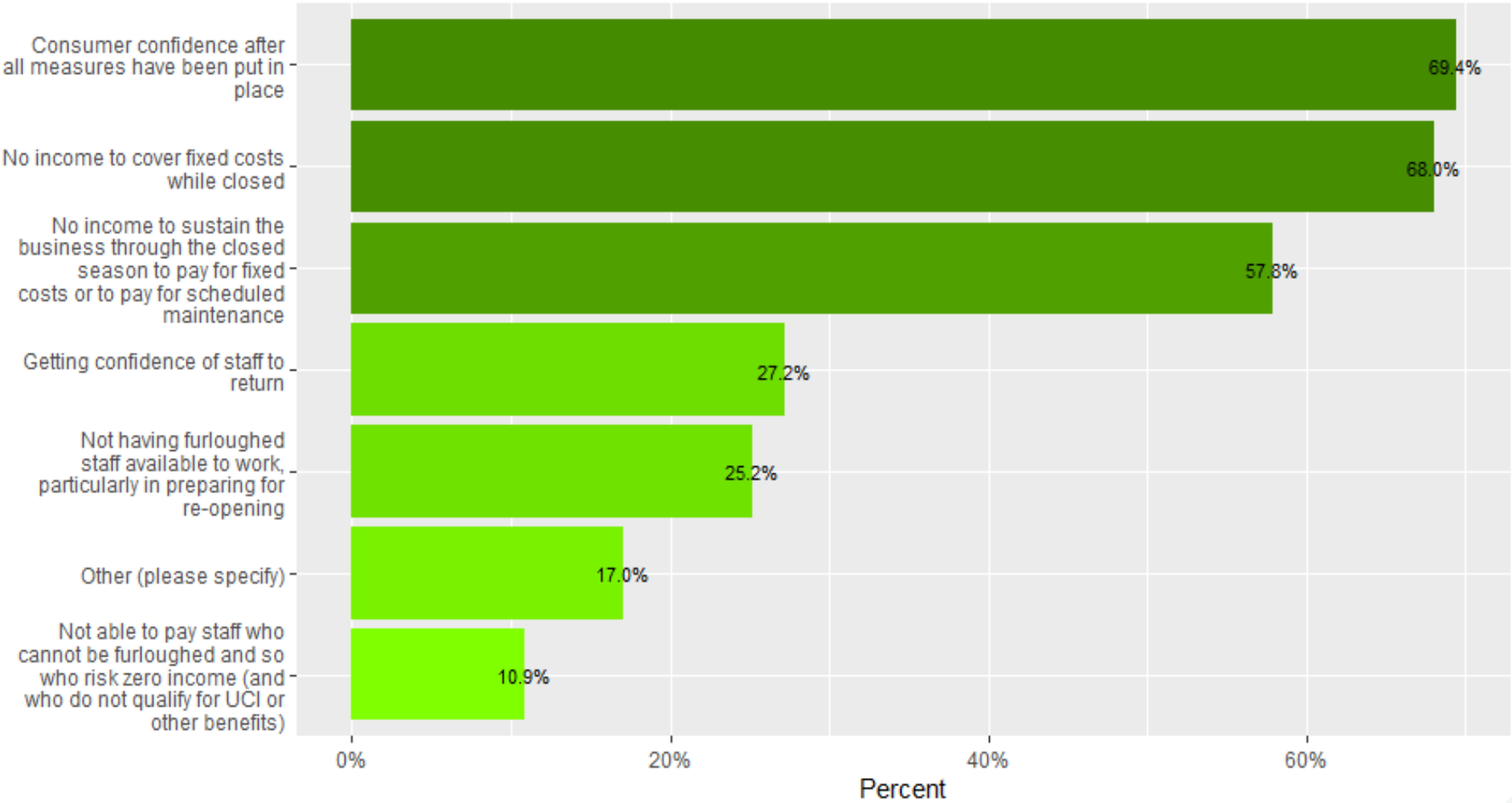
Seasonal plot: Total visitors who stay overnight in Nottinghamshire by month



- 1 business specifically states “We are going full steam ahead with all plans, hoping this is just a blip in cash flow and the staycation market will only get better”, with another focusing on maintenance for a ‘rush’ the following year (A rush isn’t unprecedented, perhaps like the March 2012 effect where it saw double the amount of overnight visitors from 2011?).
- As visible within this seasonal plot (with data sourced from the STEAM dataset) it may unfortunately be the case that businesses focused on **overnight tourism** may not experience the consistent (approximately 2.4%) annual growth the market for overnight visitors has seen if consumer confidence has not been lifted by the increasingly popular month of December
- These optimistic responses are still only 2 responses out of 147. In contrast, one respondent specifically states they are no longer investing in tourism as a result of post-Covid finances, but in latter questions there is an overwhelming amount of concern for consumer confidence in the tourism sector



Q14:What are your major challenges short term and longer term? Tick all relevant options.



“Other” includes:

Only 2 surveyed businesses have stated no challenges of any kind.

5 businesses expressing difficulty (“totally impossible”) with reopening under any form of lockdown measure

2 businesses expressing difficulty in applying for loans (street food vendor ineligible/heritage fund has been halted.)

3 businesses attempting to diversify/offer alternatives

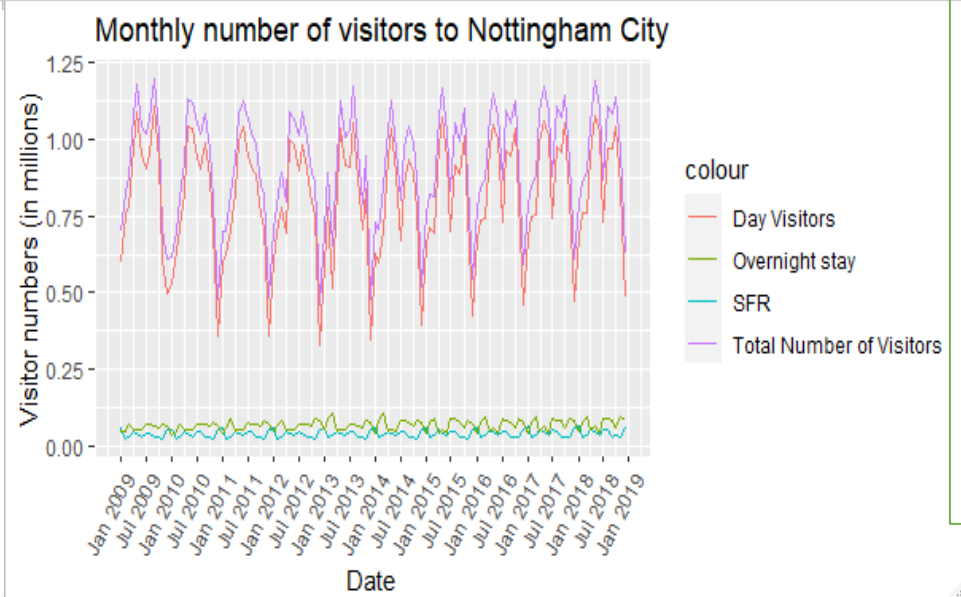
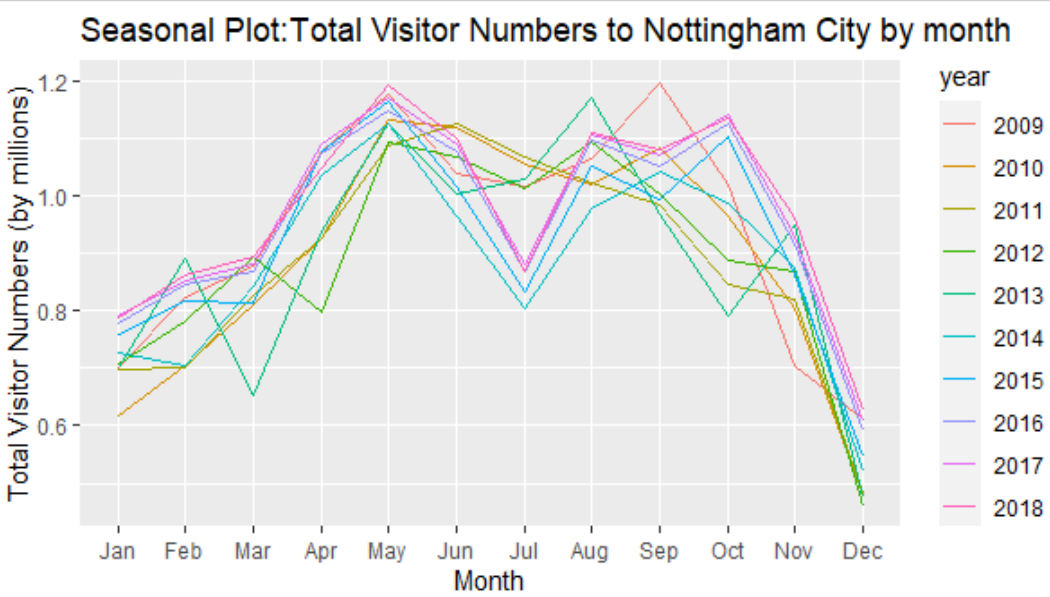
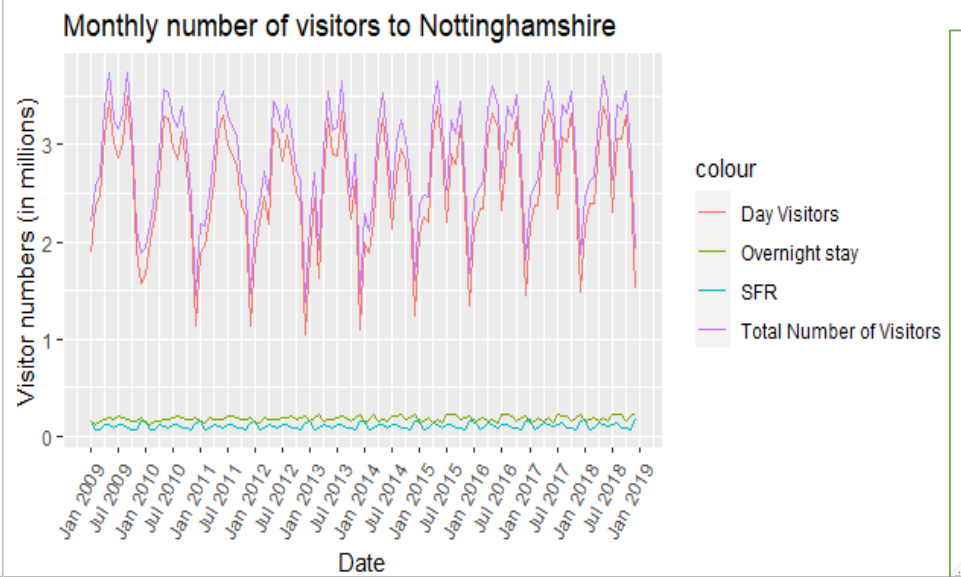
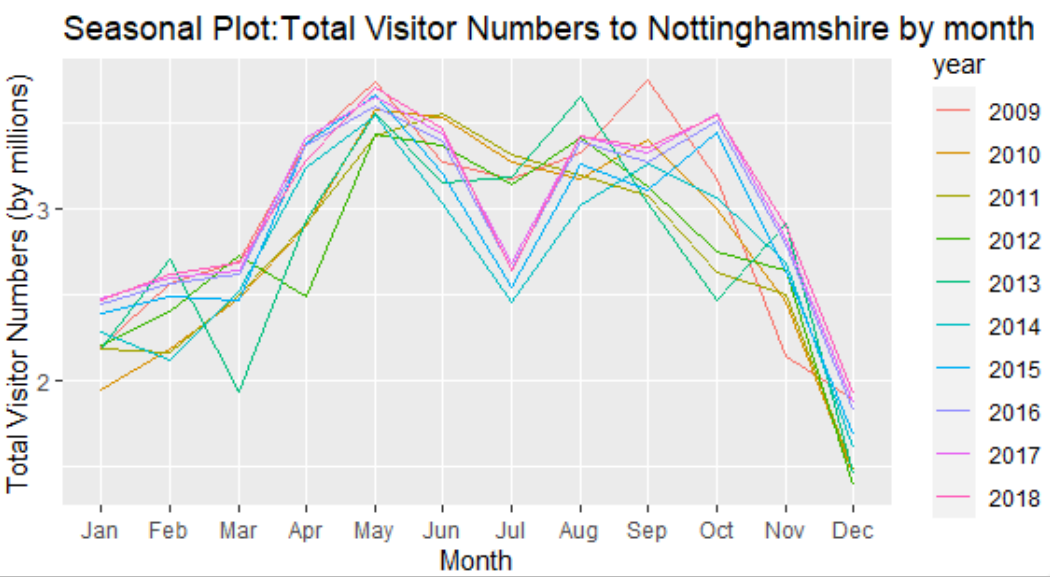
2 businesses concerned that customers with deferred bookings keep their jobs to pay for events (even deep into 2021)





# Covid-19 Tourism Recovery Planning Business Survey – Nottingham & Nottinghamshire

## Q14: 'What are your major challenges short and long term?' more "other" responses

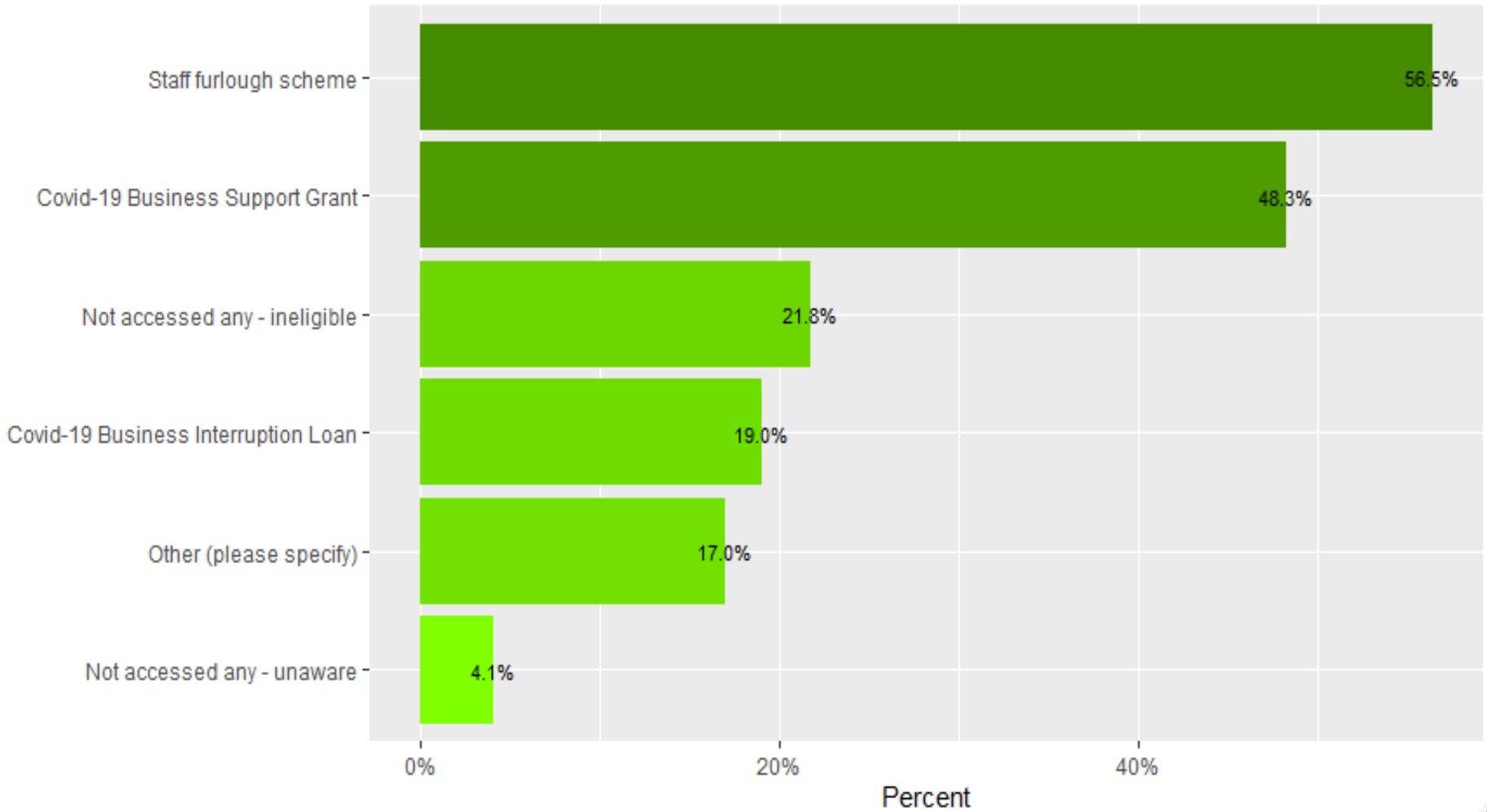


- One respondent explicitly mentions how they are only able to pay for their staff in the winter due to the profits made from holiday sales earlier in the year (which in 2020 is 0 for this period).
- As seen in the time series plots businesses relying on the seasonal footfall of visitors from May-August (see Q7 for the 50% of surveyed businesses reporting 51+% of their income from the visitor economy) they may face significant difficulties until next years influx of tourists starting from April.
- With the exception of the annual growth in overnight stays (2.4%) as seen in Q13, the minor annual growth of day visitors/total visitors (approximately 0.2%) has been consistent from 2009-2018. Latter responses frequently ask what is to be done to reassure consumer confidence so this slow consistent growth is not evaporated following Covid.



VISIT NOTTINGHAMSHIRE

Q15: What government assistance have you accessed? Tick all relevant options.



“Other” includes:  
5 businesses stating they  
have accessed the  
bounce-back loan

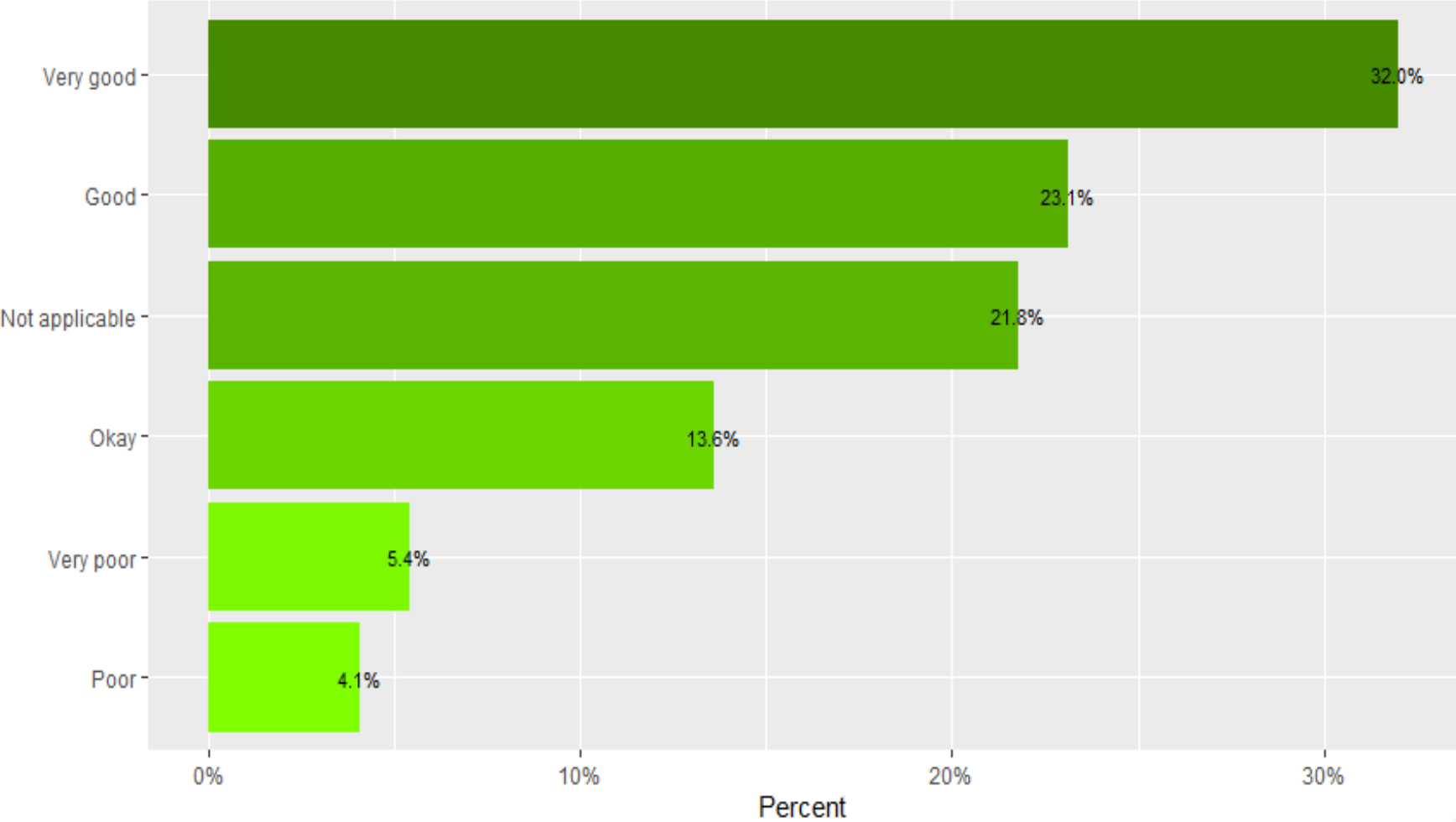
4 businesses benefited  
from business rate holiday

2 businesses did not  
request any government  
assistance

2 unique responses based  
on aid by their sector (Arts  
council emergency  
funding/agricultural rates  
relief)



Q16: If you have accessed any of the support packages what has been your experience of the process? Please also briefly explain your choice.



Due to the nature of the question there has been an incredibly mixed response relative to the type of support package accessed. While 50.1% of experiences have been positive (70.4% if removing NA's), the explanations are incredibly varied as displayed on the following slide.



Q16: If you have accessed any of the support packages what has been your experience of the process? **Please also briefly explain your choice.**

Ease of online access

Every response which cited an online application was overwhelmingly positive

There is no explicit mention of which support package was delivered online, but as the modal supply package was furlough (56%) it is the most likely suspect due to the mixed responses for grants.

Approximately 25% of responses explicitly mentioned “very quick response”

“simple application, rapid result”

“online was quick and easy”

Grant difficulties

“Nottingham City Local grants have been a dreadful process for a business to access due to the fact that no one is available to discuss individual business needs or questions”

“I have fallen between all grant cracks”

“Mixed, some councils better than others at issuing grant. Banks were supportive but very long winded and bureaucratic.”

Miscellaneous positives

“The process has been surprisingly straight forward. Furloughing has been a difficult decision as we still need staff working on site and we don’t know when re-opening will happen”

“NSDC were excellent in providing the grant quickly and without fuss - fantastic support. Good feedback from your staff as well”

“Very helpful member at Newark & Sherwood assisted with application of rates relief, very prompt which was very welcome”

Communication inconsistency

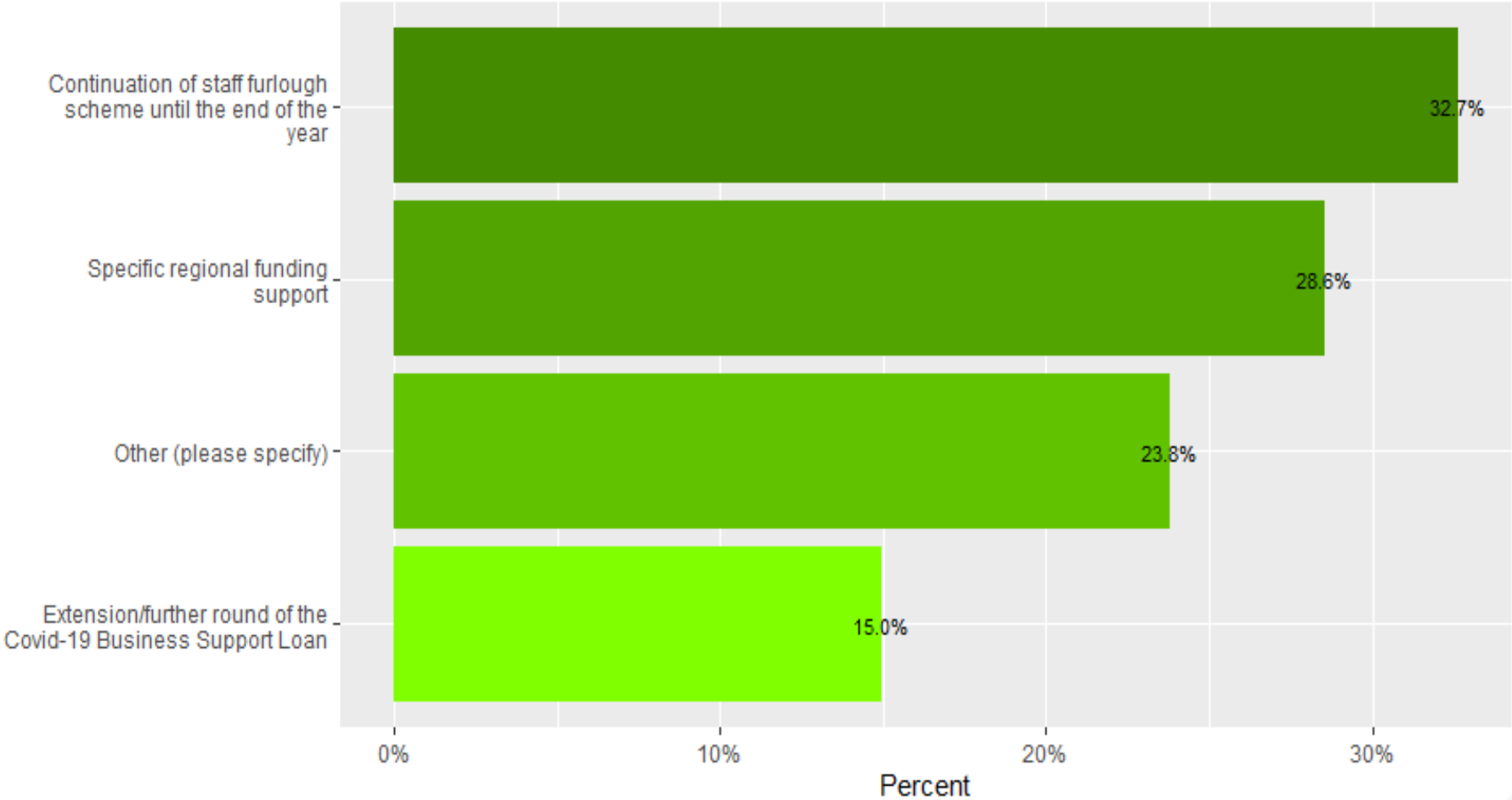
“All the rules are somewhat conflicting”

One business was approved a £25k grant by Gedling but Sherwood/Newark did not approve the same type of grant for the site within that district despite the same information given

“Our application was denied 3 times. Finally approved due to not receiving correct details from the council to fill out the forms”



Q17: What further, or continued, financial measures do you envisage your business needing from Government in the recovery period when restrictions begin to be lifted?



“Other” includes:

5 businesses that do not need any further assistance

Approximately 20% of responses aren’t related to financial measures (further stressing the need to remove/limit social distancing as that has a severe impact on the business)

The rest of their desired financial measures are relative/unique to their business sector, these are listed on the following slide.



Q17: further financial aid suggestions (albeit many respondents conflated government aid with financial assistance)

“None provided we don't get a further lockdown”

“Lifting bans on international and domestic travel ”

“If the public comes back no problem”

“Rent reduction, and/or additional support grant”

“Extension of grant funding periods”

“Can't afford to borrow money as I have no idea where my business will be in a year's time”

“Anything would help!!”

“Reduction of excise duty”

“Make landlords holiday property eligible for business support grants”

“Help for newly self employed. Ongoing assistance for the travel industry that is reliant on overseas travel”

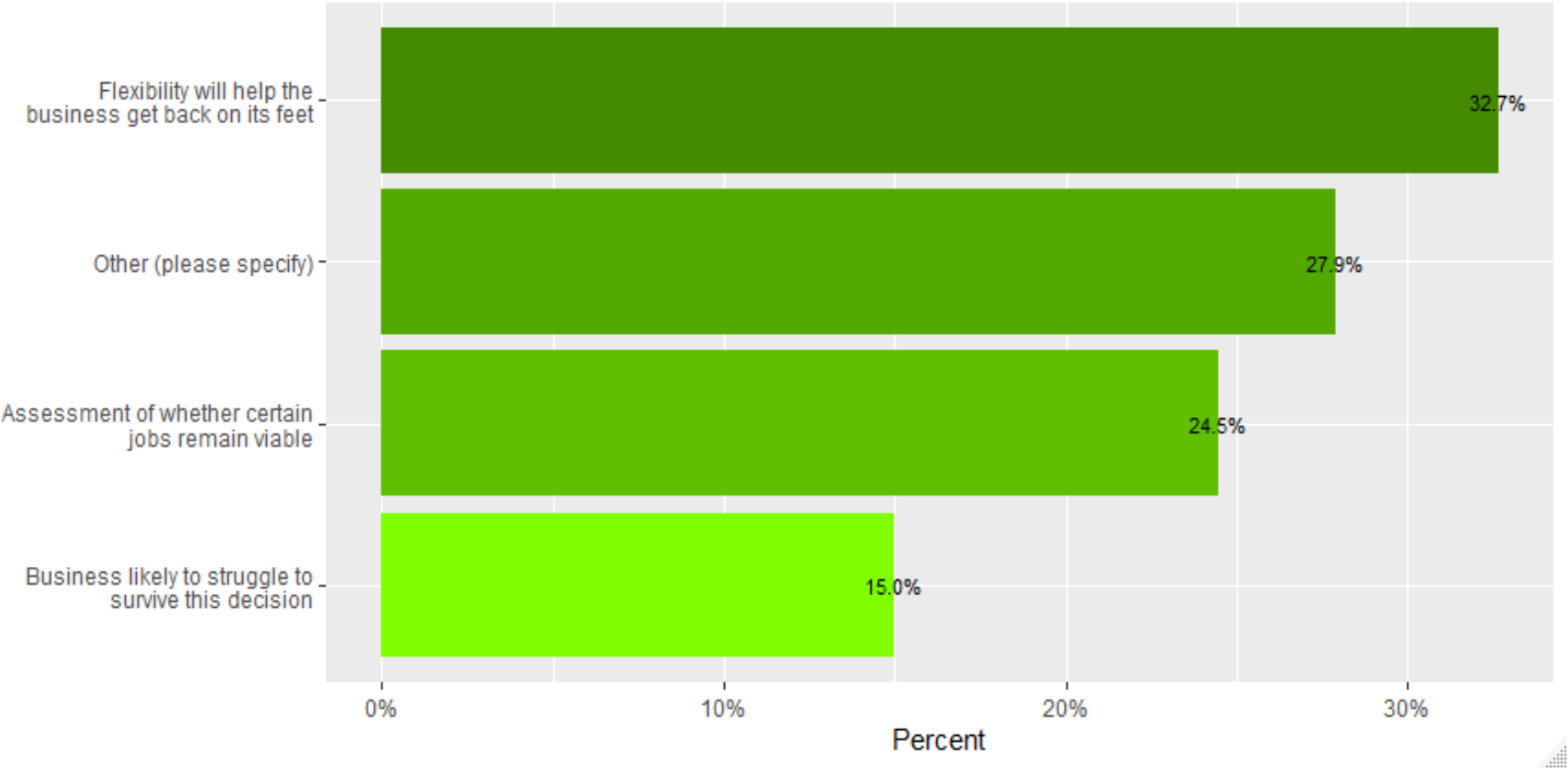
“Further business support grant”

“Need confidence from local authorities to invest more in tourism infrastructure. Hope that we can be eligible for CJRS”





Q18: New flexibility to the furlough scheme will be introduced from August to get employees back to work with employers being asked to pay a percentage towards the salaries of their furloughed staff. What impact will this decision have on your business?



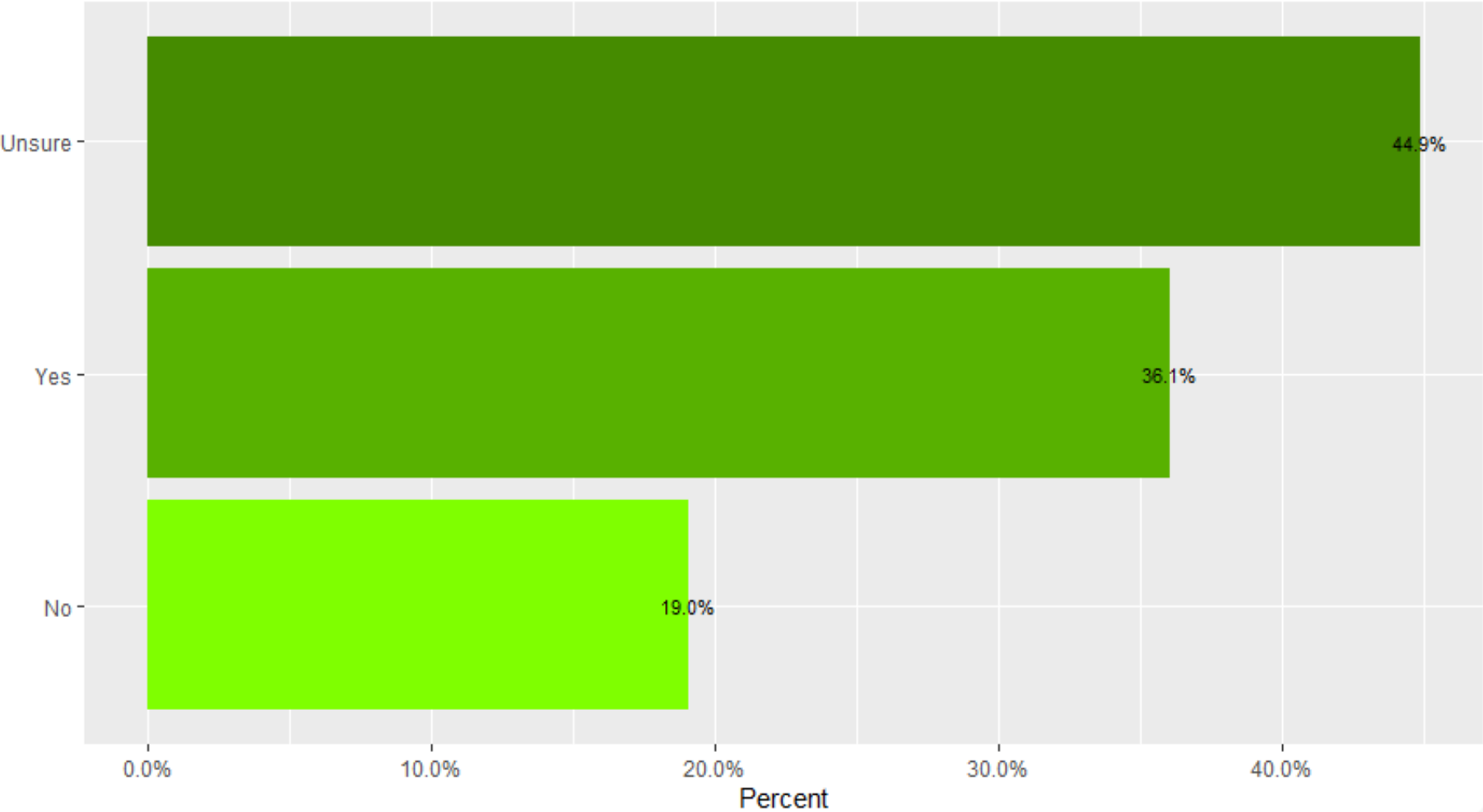
Other:  
38 responses/25% NA  
(Not furloughed)

1 respondent to open in August due to Covid concerns and hence can't pay staff

2 respondents simply aren't affected by Covid due to the nature of their business (they have stated livestock aren't eligible for furlough)



Q19: If business rates are reintroduced after 12 months will you be able to survive?



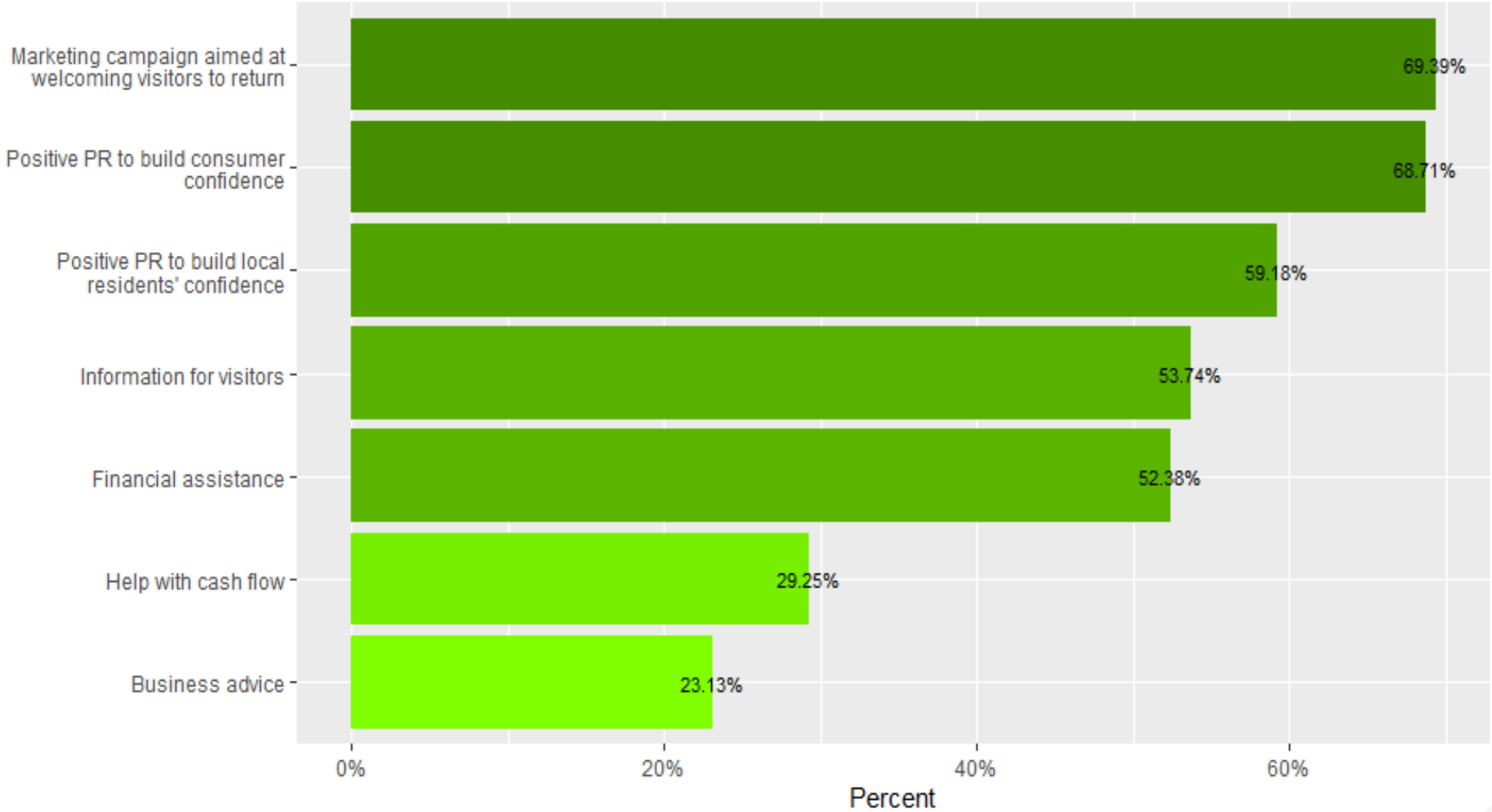
Majority of surveyed businesses are not certain if they can survive following business rates re-introduction.





VISIT NOTTINGHAMSHIRE

Q20: Once restrictions have been lifted, or a plan for lifting restrictions has been laid out, what would help your business and the area recover? Tick all relevant options.



While approximately 69% of surveyed businesses would support a marketing campaign to boost consumer confidence and increase day visitors, it shouldn't be overlooked that 52% of businesses still require financial assistance with 23.13% requesting advice on how to run their business.

Q20: Further data to support the concept of welcoming visitors to return



VISIT NOTTINGHAMSHIRE

Monthly total visitor numbers of Nottinghamshire by total economic impact



While it would seem obvious that an increase in visitor numbers is also met with an increase to the total economic impact of the visitor economy, the modal recommendation in Q20, ‘welcoming visitors to return’ shouldn’t be exclusively interpreted as a Covid recovery plan.

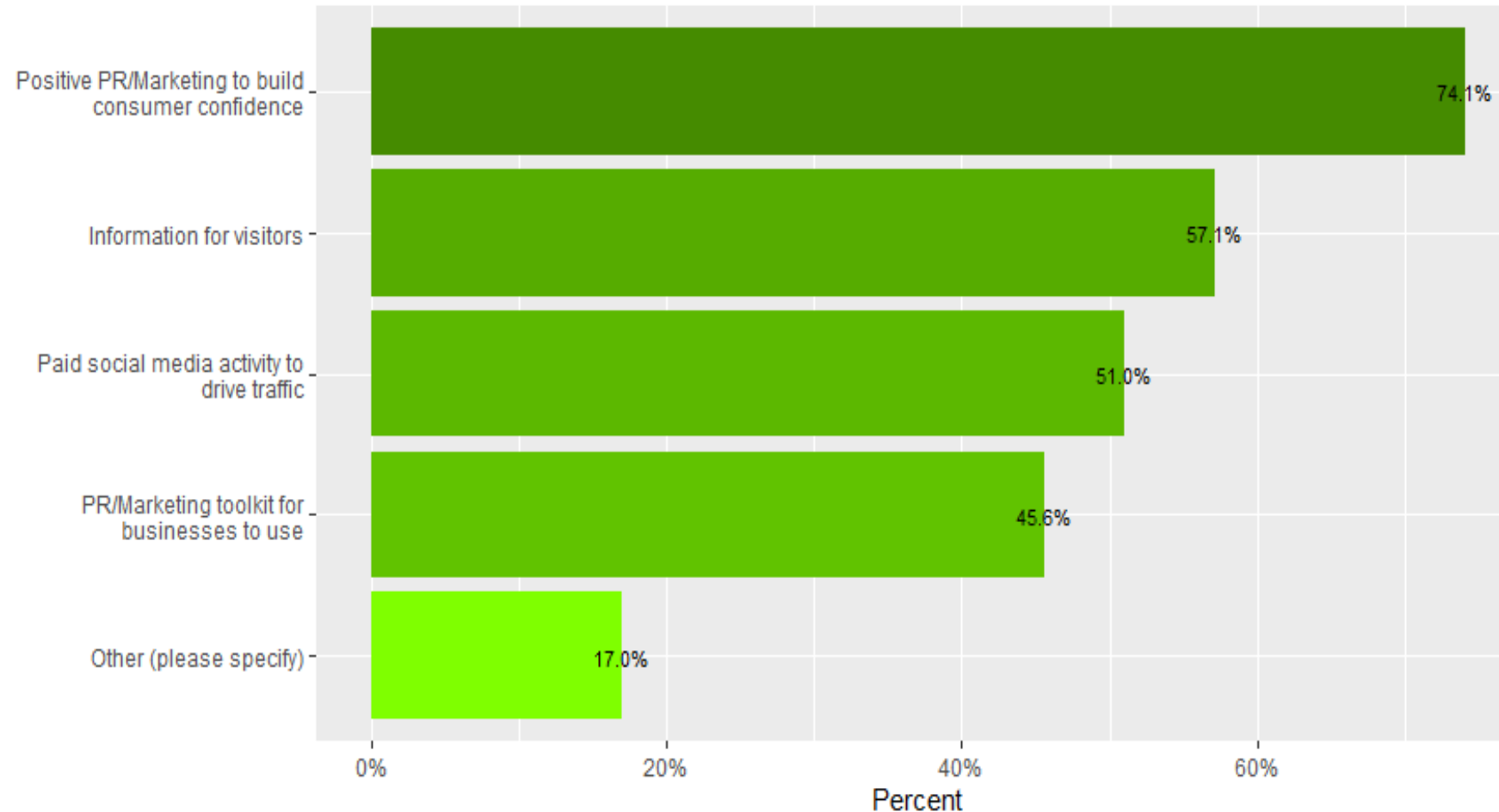
Based on a simple linear regression of the monthly economic impact of the visitor economy by total monthly visitor numbers (tabled below); an increase in one million visitors is significantly associated with an £165,540,000 increase in the total visitor economy.

Subsequently, it should always be an objective to increase the amount of total visitors to Nottinghamshire.

Coefficients	Estimate	Std Error	T value	P value	R <sup>2</sup>	Adjusted R <sup>2</sup>	F-statistic
Intercept	0.64326	0.13273	4.846	0.001***	0.71	0.70	290.5***
Total economic impact (per £100mn)	1.6554	0.09708	17.043	0.001***			



Q21: There will be an increase in marketing focus on domestic staycations to try and offset any impact of this outbreak. Please indicate which of the following marketing initiatives would help your business



“Other” includes:

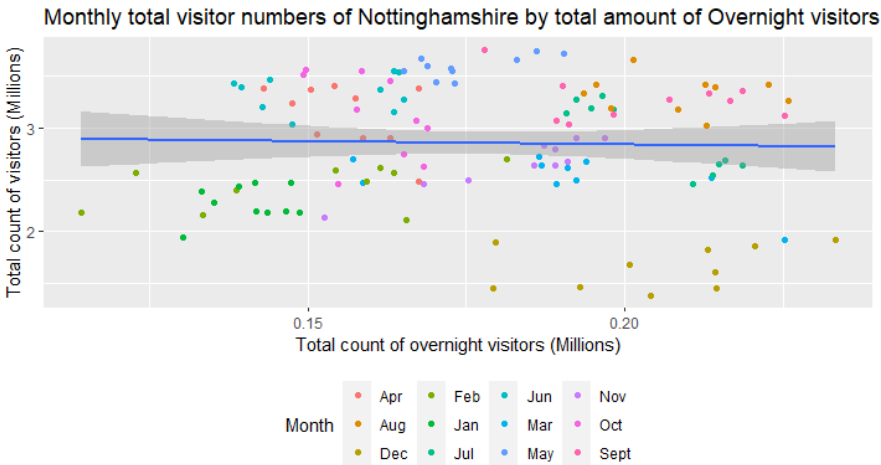
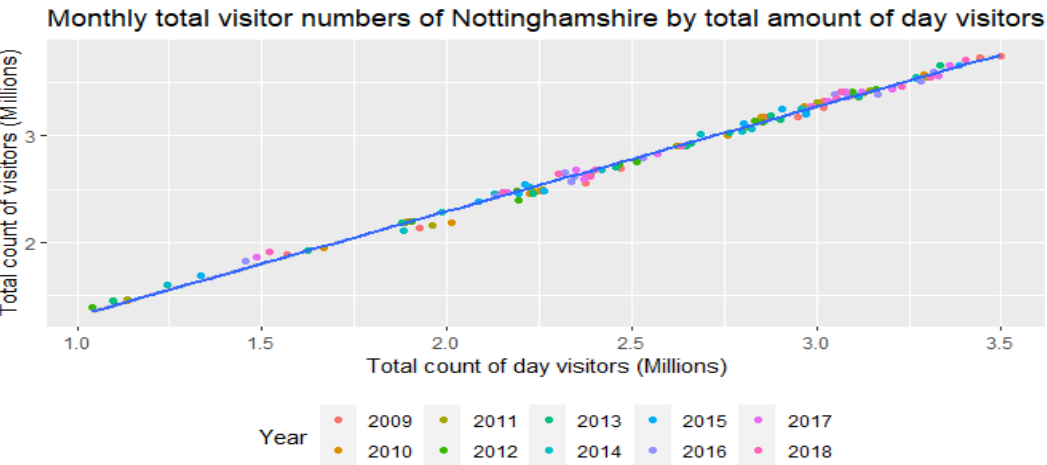
*“Being part of the process”*  
*“Website assistance with E-commerce”*  
*“Region marketing push to illustrate what's best about the area”*

Only 2 responses stated they do not want any marketing assistance  
 Further “Other” responses and analysis on the following slide.



VISIT NOTTINGHAMSHIRE

Q21: Marketing initiative custom responses (not all responses are directly marketing initiatives)

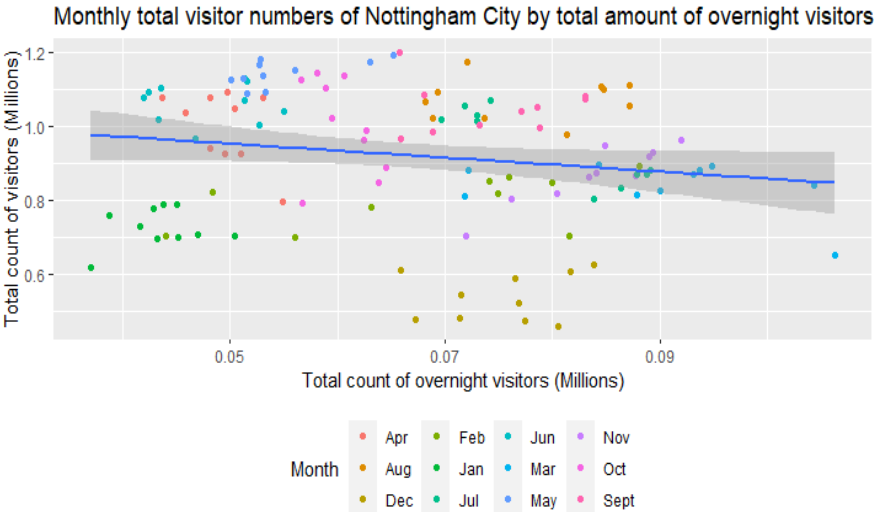
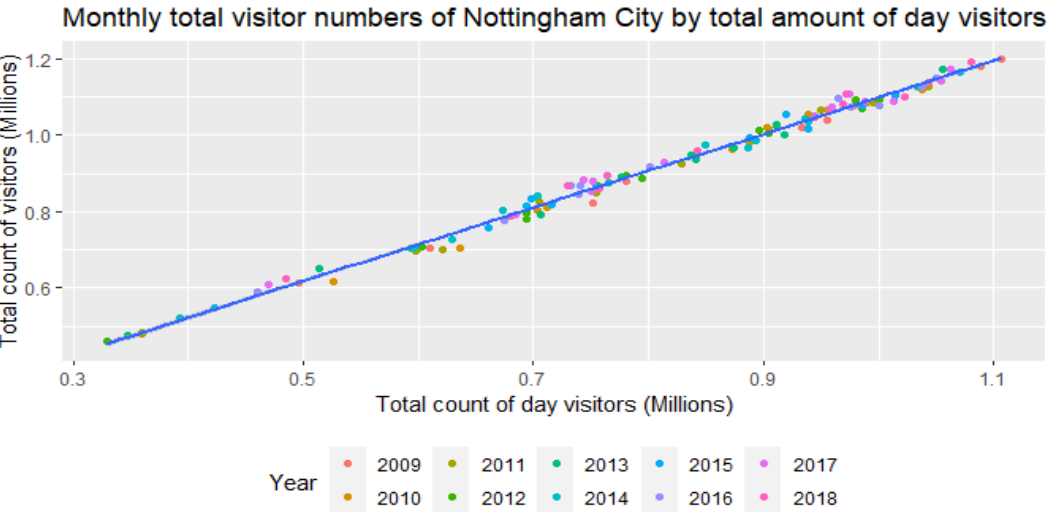


“More pedestrian areas for locals to use. Don't have to rely on people driving in”

“Good broadband to the rural sector”  
*50% of surveyed businesses are rural as stated in Q3*

“New directional signage”

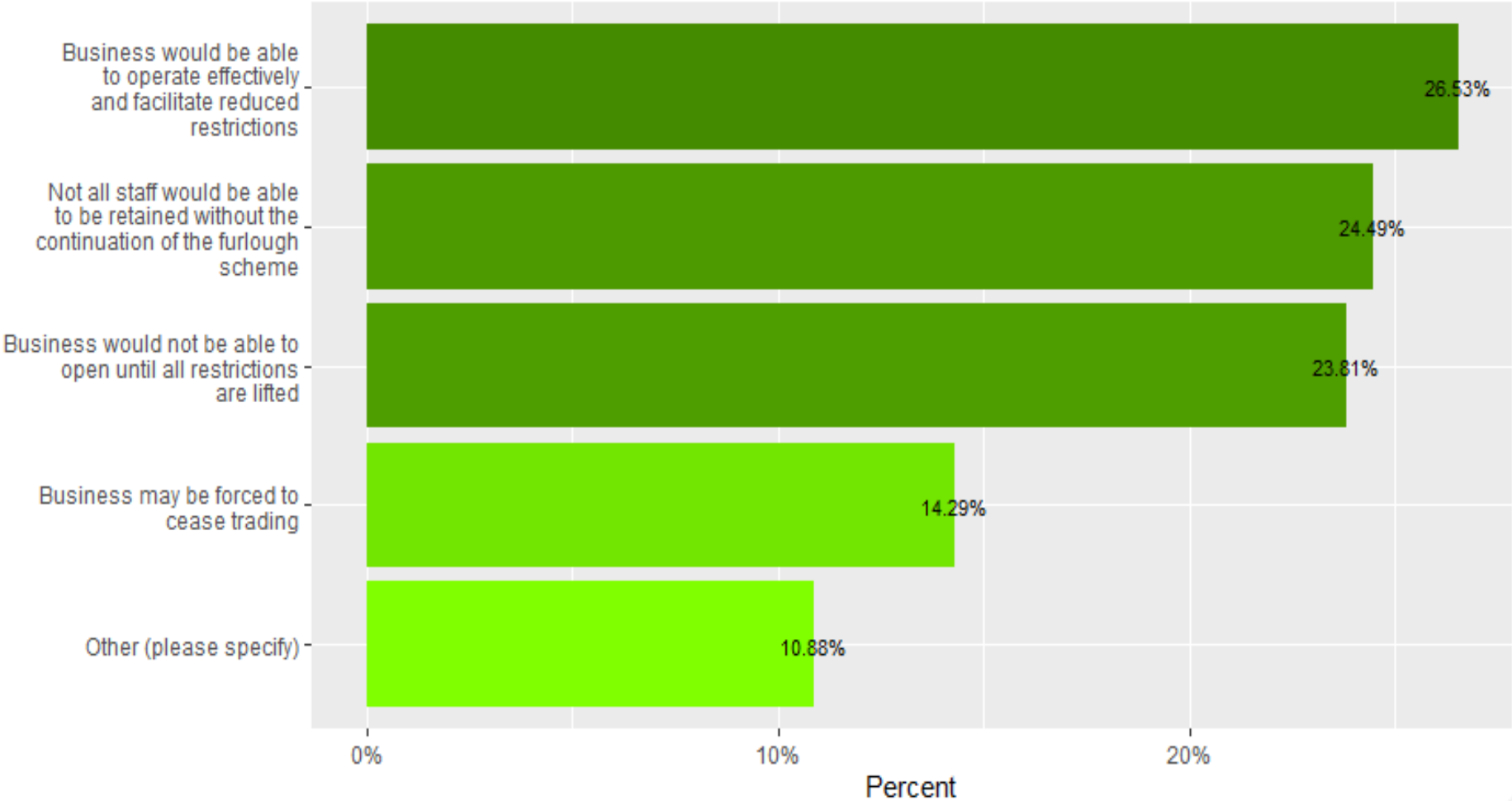
“Need to encourage and exploit local ‘in area’ visitors”, the total amount of visitors is only positively correlated with day visitors for both Nottinghamshire and Nottingham city. Subsequently, the respondent is right in that local ‘in area’ visitors should be exploited to maximise the tourism sector as a whole in contrast to marketing for overnight visitors.



“Brown tourism signs supplied free to boost the area. Visit North Nottinghamshire emphasis on outdoor sports and activities”



Q22: What impact would a staggered reopening have on your business?  
(For example, if businesses are permitted to reopen but with existing social distancing measures)



“Other” includes:

4 businesses stating that it will have no affect whatsoever (possibly never affected by lockdown?)

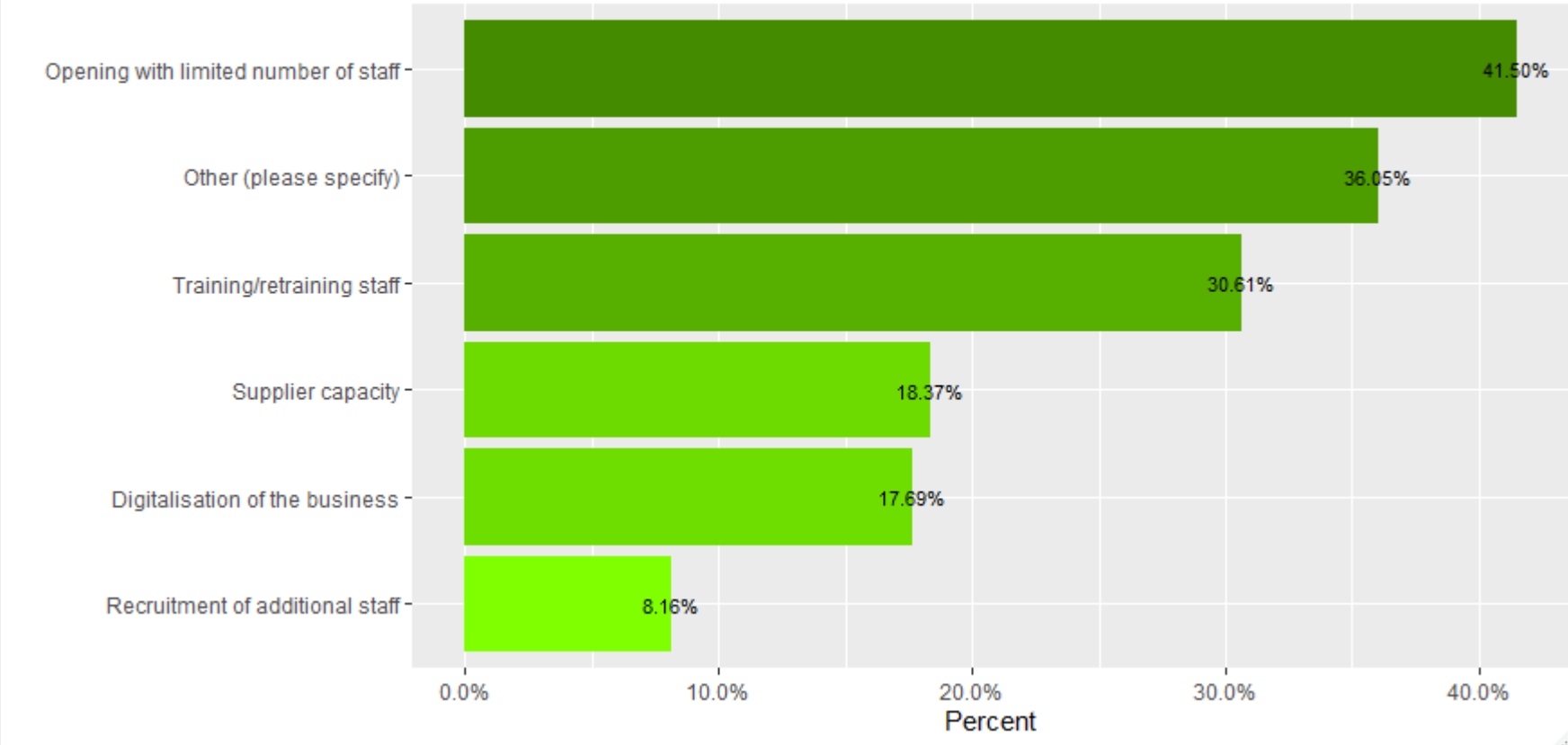
1 business states that all options are a possibility

5 businesses stating that they can open in some capacity but may cease trading if the measures continue for too long





Q23: What specific operational difficulties do you anticipate when looking to reopen your business and will you need Government assistance and guidance ahead of this? Tick all relevant options.



“Other” includes:  
14 (9.5%) of businesses stating no operational difficulties.

24 (16%) of businesses stating difficulty in maintaining social distancing;  
Of which, approximately 50% of these are concerned with the **clarity** of Covid guidelines/redesigning the physical layout of their business to accommodate distancing.

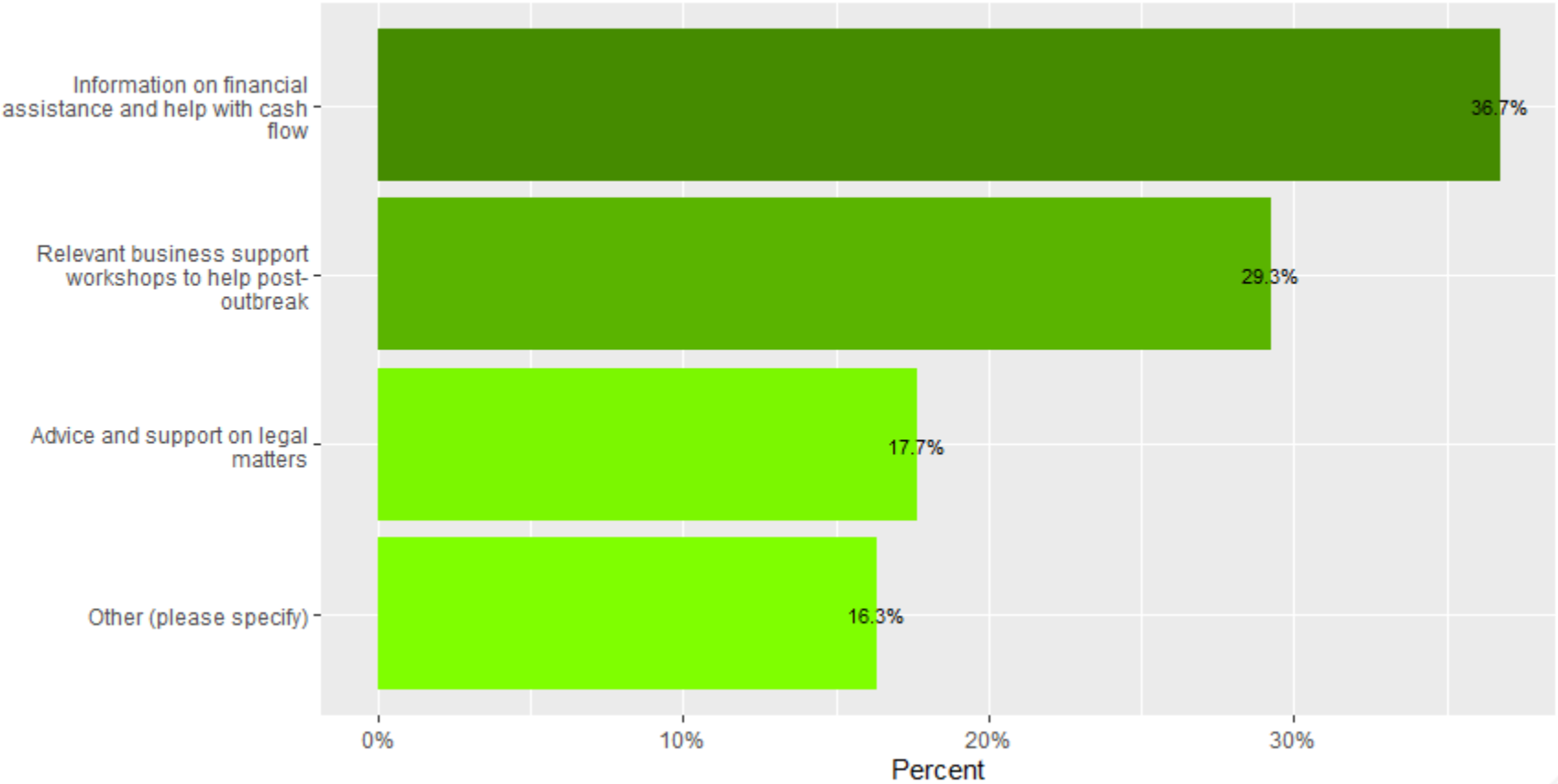
*Surprisingly this is the only question where a single business expressed fear about coping for a 2<sup>nd</sup> wave of Covid; specifically if government guidelines would enforce another 2-3 week lockdown on their company in such an event.*







Q24: What type of business support and advice would help your business?



“Other” includes:  
12 N/A  
2 responses about how would somebody else know how to run their business (*you know the type.*)

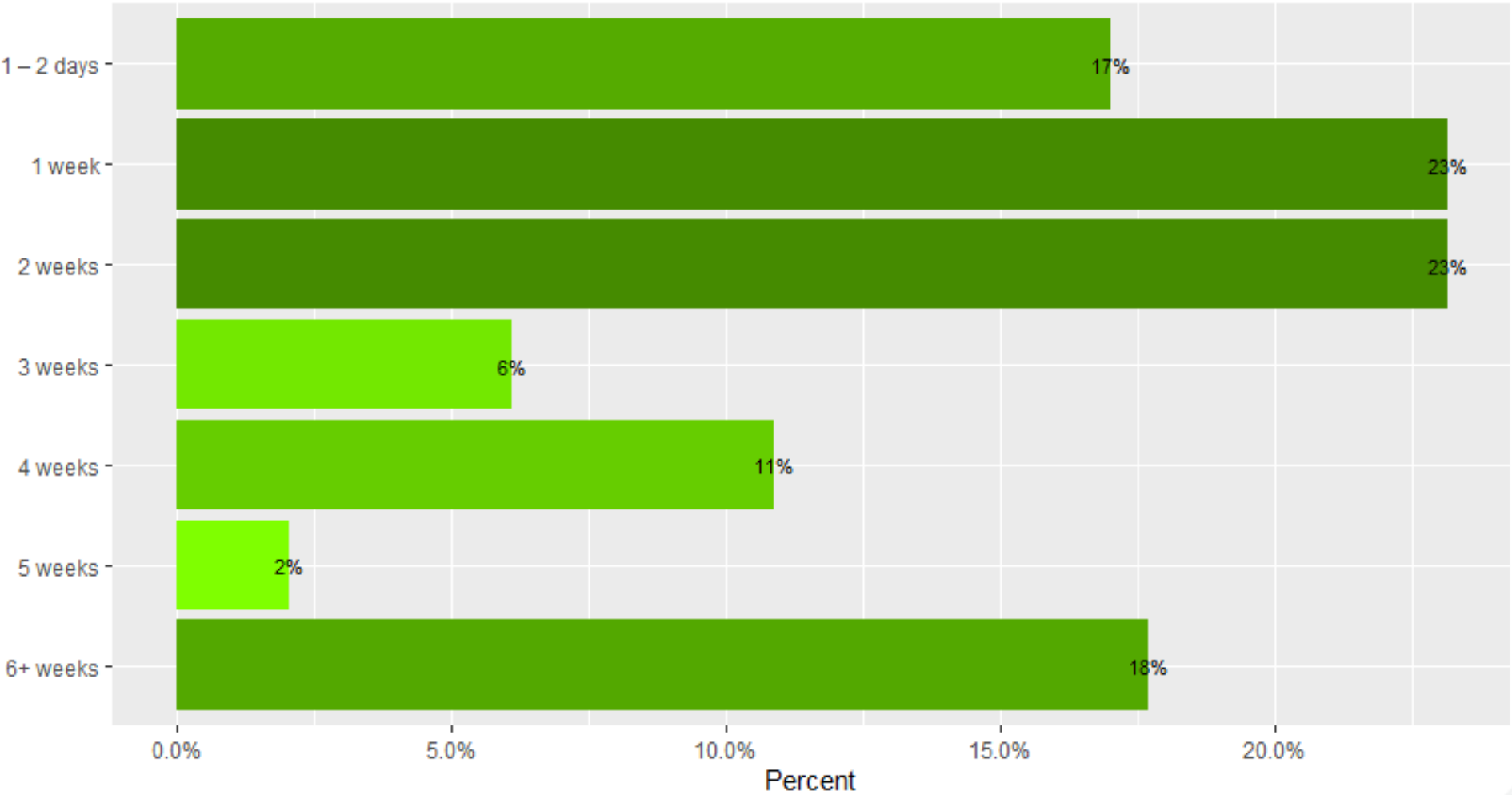
2 responses specifically requesting advice on how to receive grants.

1 request to re-open lockdown measures/restore confidence to “rescue as much of the summer's business opportunity”

One lengthy “other” response recommends hosting an online web forum for businesses to see what other small hospitality businesses are doing (specifically weekly/topical marketing advice they can also utilise).



Q25: How long will it take for your business to change or reactivate your supply chain?



Should be noted that 80% of all businesses supply chains can be reactivated within a month.



## Question 26: What difficulties may be present in changing or reactivating your supply chain?

### Overview:

Only 33 (22%) of businesses state there will be no difficulties reactivating their supply chain,  
20 (13%) businesses states their difficulty will be preventing infections and/or utilising PPE,  
Only a single response states the difficulty of continuing work in the event of a 2<sup>nd</sup> wave as business cannot function with stop-start operations  
15 (10%) businesses state their difficulty will be solely dependent on consumer confidence (“visitors are their supply chain”)

“Waiting for other businesses to react/implement change”

“Money. always money!  
Closed during our busy season now summer our dead season and no income”

“New building of lodges will be massively delayed now”

“Re training of staff to ensure new guidelines followed”

“Suppliers have gone bankrupt”

“No income to fund reactivation”

“City centre parking and delivery restrictions ”

“People not taking UK trips”

“Ready to reopen when legally allowed to do so”

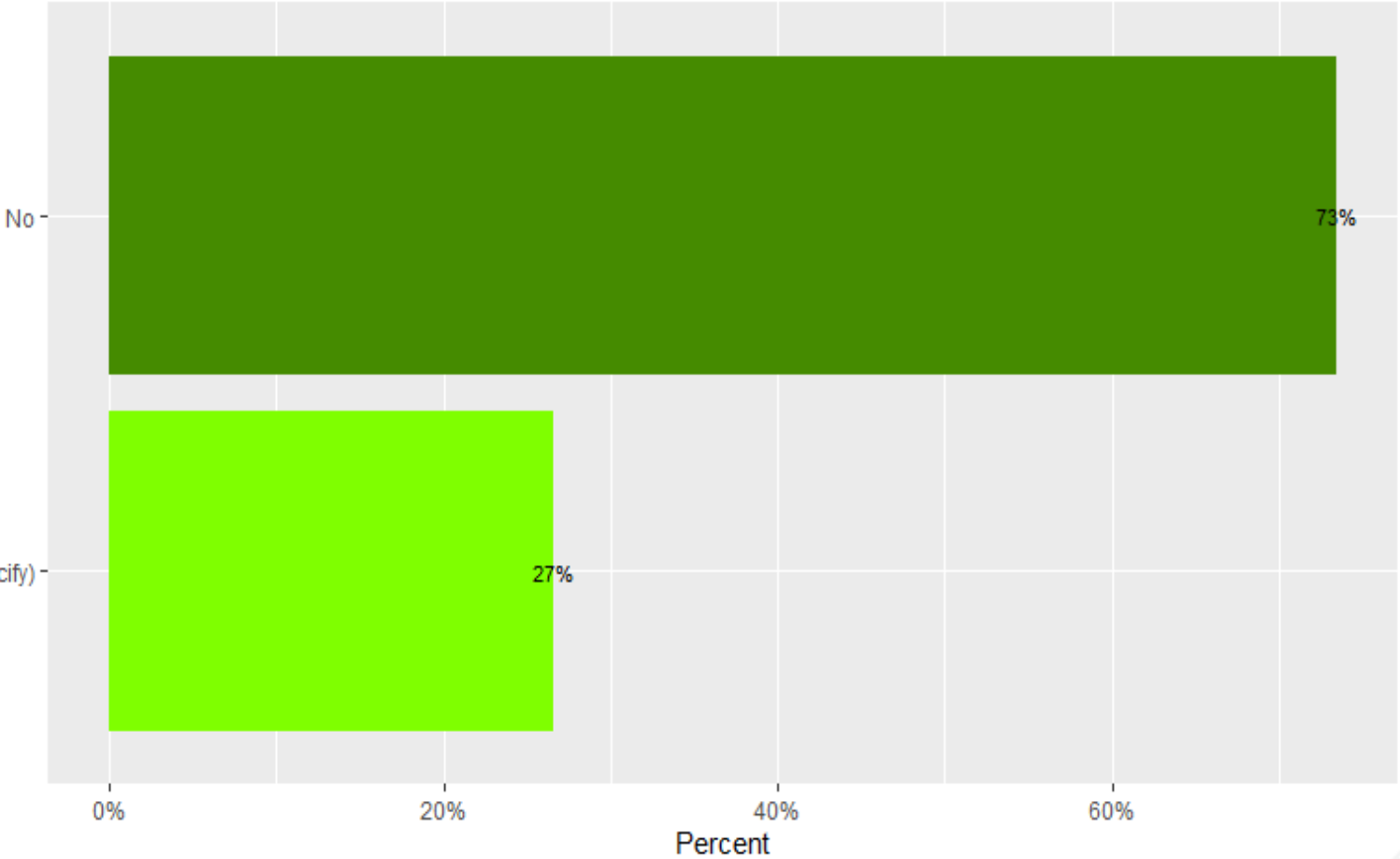
“Availability of ingredients for our distinctive menu”

Public access bringing in potentially infected people and books and DVDs being returned, the latter to be quarantined for 72 hours and cleaned before being returned to stock



Question 27: Do you feel that you need guidance on cleaning and hygiene measures ahead of reopening?

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Overview of yes responses:  
Virtually every yes response was just reassurance and clarity on hygiene guidelines for their premises

**Explicit concern over public toilets/restrooms and spread of infections in these areas.**

***“Always a help sending written guidelines”***

# Question 28: What fiscal measures should be taken to boost business in the hospitality and tourism sectors in the immediate aftermath of COVID-19 restrictions being lifted?

## Overview:

50% of responses are not applicable, “unsure” or “?”

Approximately 25% of responses suggest some form of tax reduction (typically non-specific or VAT reductions)

Approximately another 10% of responses suggest grants (yet again, non-specific)

“Focus on local - UK based tourist - staycation”

“Backing Britain campaign , stay in Britain, participate in sport, culture and leisure activity. similar to a festival”

“Investment in tourism should have the same tax relief as research and development”

“Rescue package to include help with advertising”

“A reduced rate of VAT for hospitality. It doesn't stack that supermarkets pay less VAT on hospitality items such as beer and food just because they sell them cheap. The added value we charge simply goes to paying people and we need more of them! ”

“Support tourism businesses longer than other sectors that can bounce back quicker”  
**See slide 17 for the seasonal trends of visitors that supports this claim**

“Greater investment to encourage visits and spending. Appreciation that tourism and hospitality are not Cinderella services but a key to the quality of life of this country.”

“Support Local safe and comfortable environment promotions”.

“Cost of extra hygiene equipment not to be absorbed by visitor or attraction venue





Question 29: What steps should the Government take to boost UK inbound tourism when social distancing measures are lifted?

Overview:  
25% of responses are not applicable, “unsure” or “?”  
Approximately 25% suggesting a local/national marketing campaign  
Approximately 15% suggesting a reversal to the current airport quarantine measures due to inflammation of negative perceptions of tourism  
Just 4 businesses (2%) support airport lockdown measures).

“Support local tourism boards to run safe to visit campaigns to rebuild visitor confidence”

“Create a climate of Covid confidence - i.e.: show the world we are able to deal with this in an effective way. Clearer messaging.

“Assistance with local public transport networks”

“Clear messaging!  
Financial support.  
Very clear guidelines.  
Direct and honest consulting with the sector”

“Marketing campaign, focused on digital.  
Networking workshops linking sites together - local hotels and visitor attractions etc. Extend Brexit transition period.”

“Celebrate UK tourism, MPs should visit local attractions publicly to boost confidence”

“I’m backing Britain campaign , also effective government funding support for participation projects in sport, art, leisure”

“Reboot the GREAT campaign”

“Promote GB as a safe place to visit”

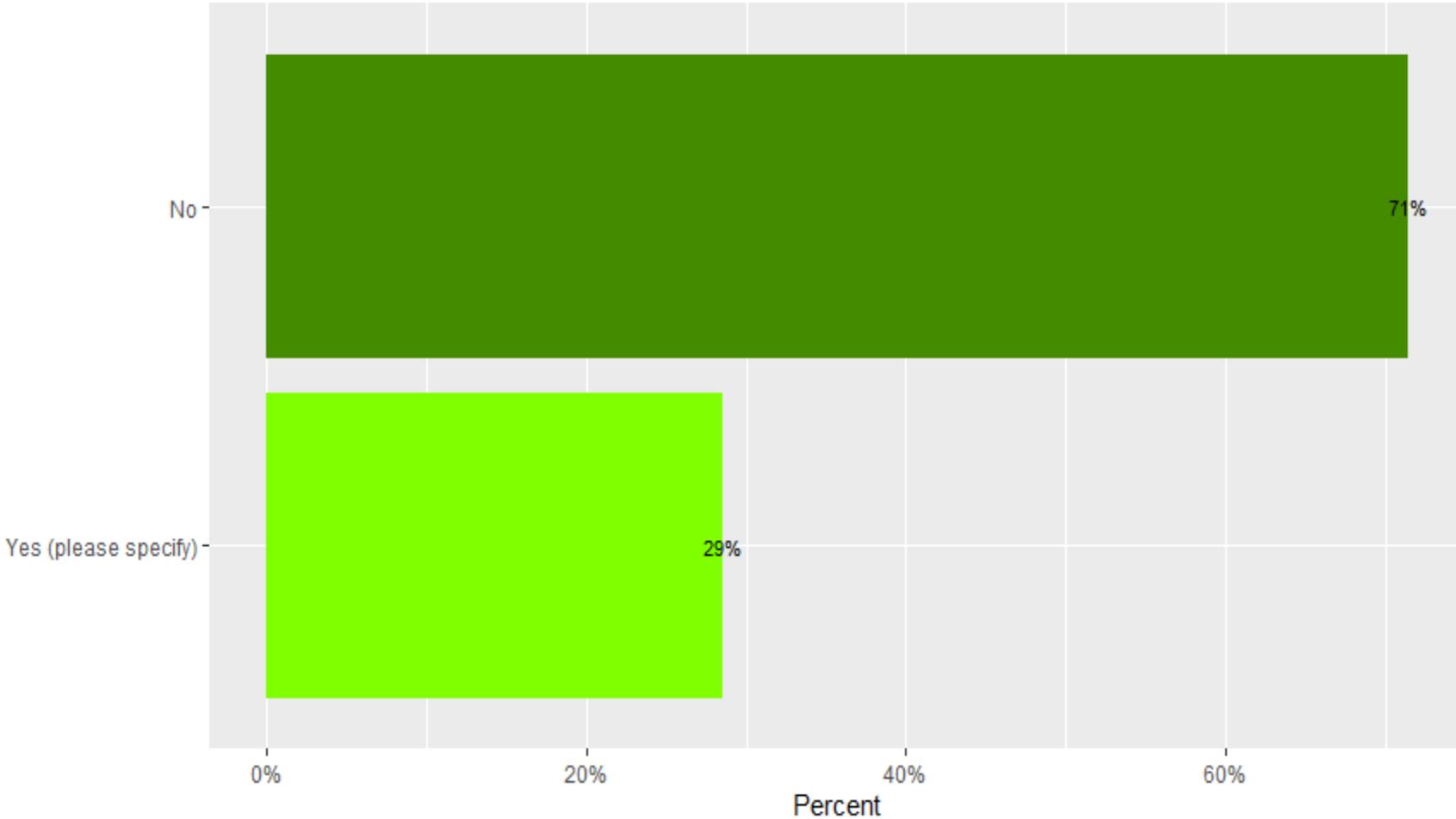
“Continue with public information bulletins - lest we forget”

“They could point out to British people that they live in one of the most interesting places on the planet, even if the weather isn't always very nice”





Q30: Are there any other key areas of support that you feel either the sector, or your individual business, require outside the scope of the above questions?



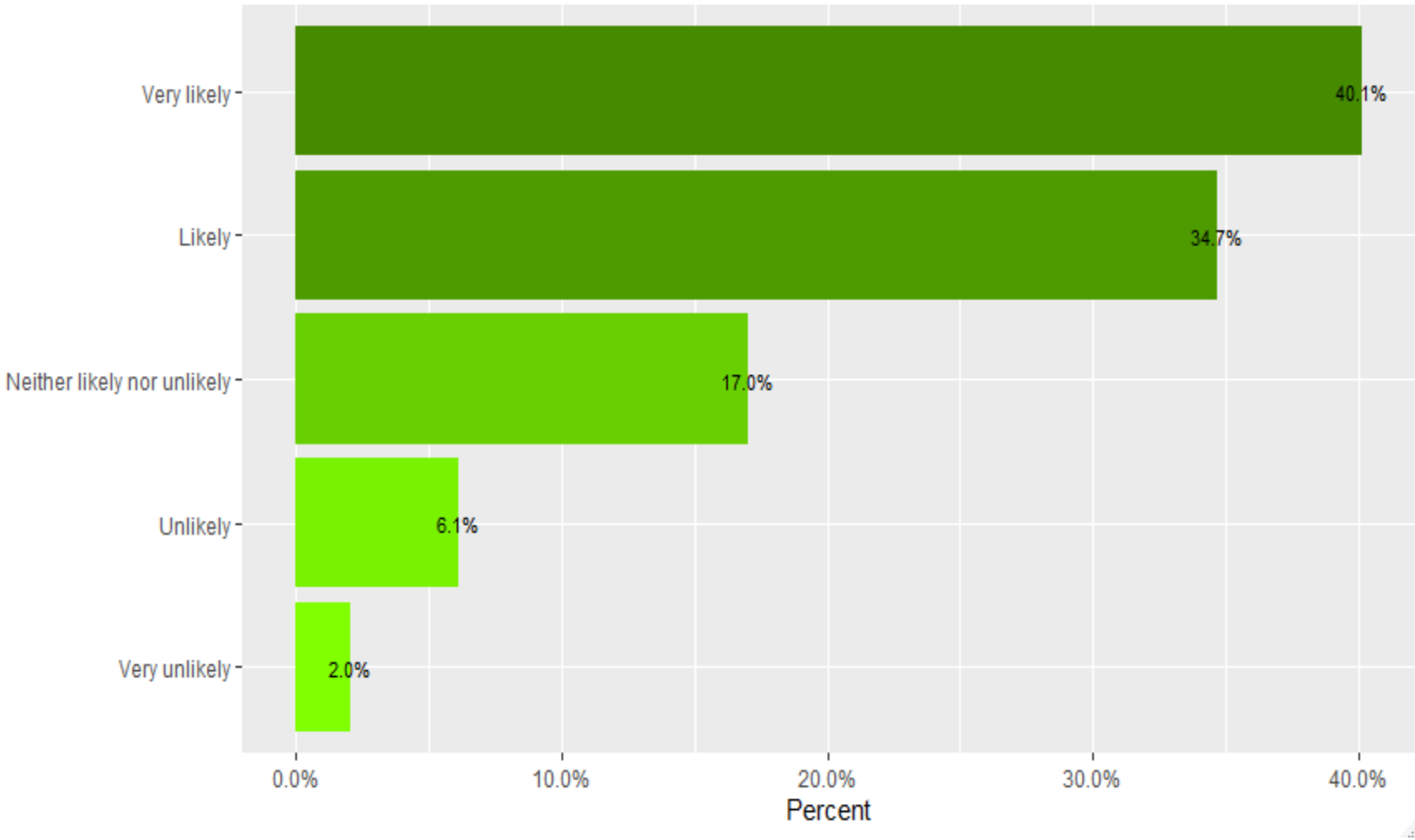
Despite the phrasing of the question the “yes” responses were another opportunity to express the desire for further **clarity/leadership** on how businesses will cope following the lockdown period especially businesses who were ineligible for grants (e.g. street food vendors).

Yet again explicit concerns for the tourism industry, specifically outbound tourism that will take “years to recover”.

One unique response highlighting the equine industries role in local rural tourism requesting a spotlight as it’s the “2<sup>nd</sup> biggest rural employer” and its impact is allegedly unexplored.



Q31:How likely is your business to survive and re-commence trading if Coronavirus restrictions are removed by end of June / July 2020?

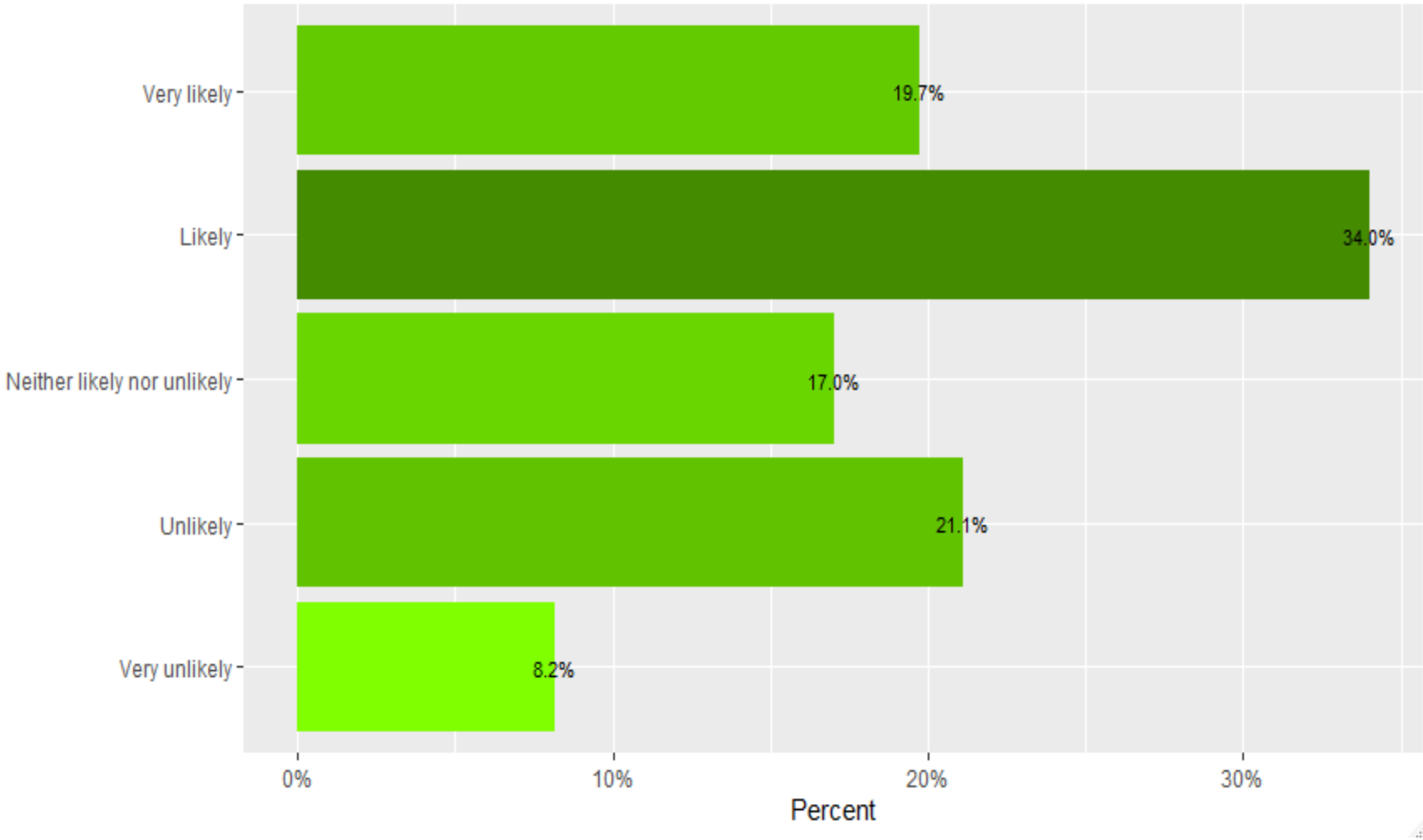


Comparative analysis on the following slide.

Note that 8.2% of businesses are explicitly unlikely if restrictions aren't removed by July.



Q32:How likely is your business to survive and re-commence trading if Coronavirus restrictions are removed by September / December 2020?



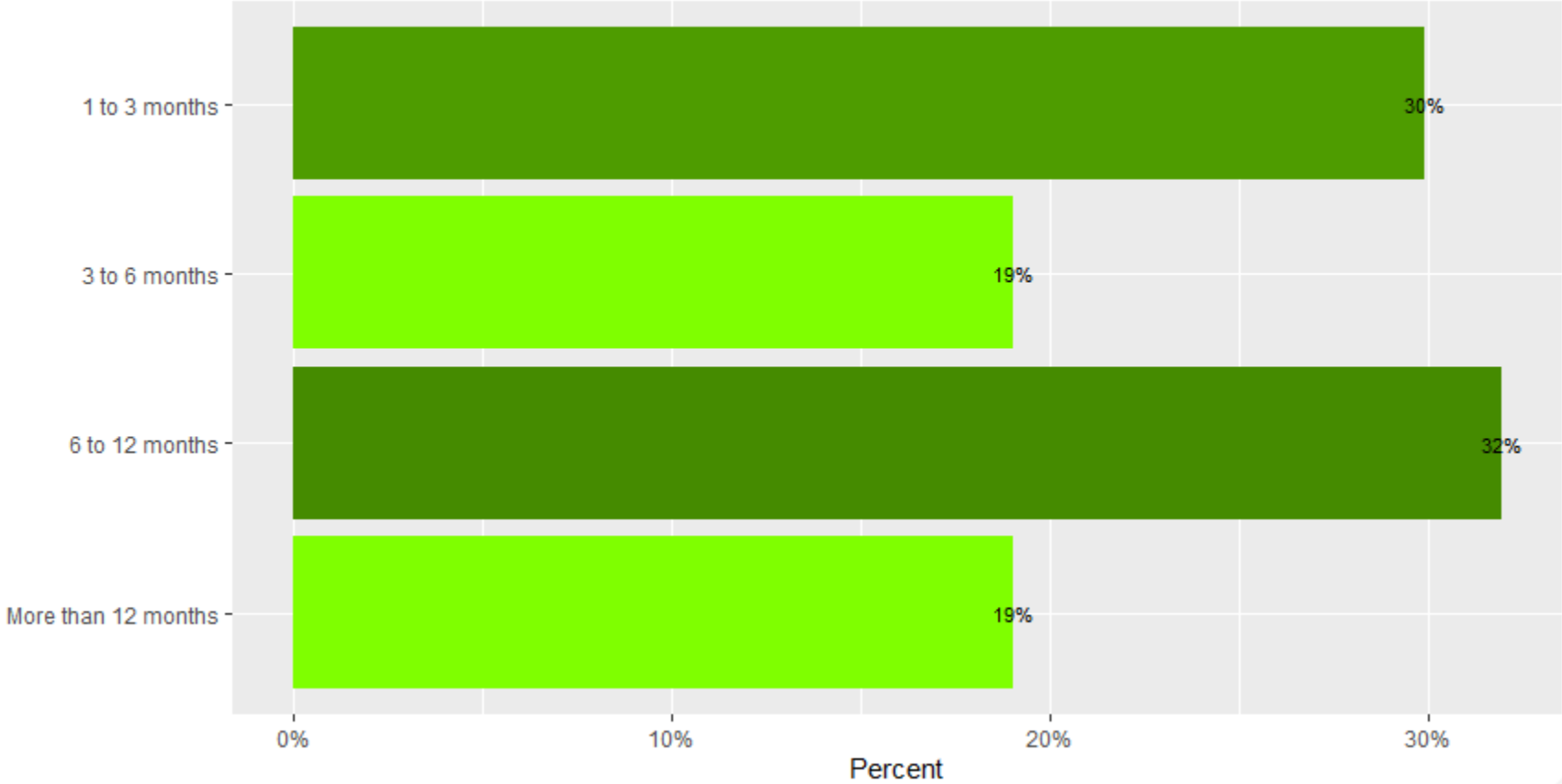
74.8% likely or higher chances of survival to 53% if restrictions are not lifted by December.

29.3% of businesses unlikely to survive if Coronavirus restrictions are not lifted by December compared to 8.2% if lifted by July.

Do note the phrasing of the question is *restrictions* and not explicitly lockdown measures. Previous custom responses indicated severe logistical difficulties if social distancing had to be enforced; this question may include responses on 'restriction'.



Q33: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?



While only 49% of businesses will only be able to get back to normal within 6 months; it is essential to remember the seasonality of visitors to Nottinghamshire as stated in slide 17.

As there is a clear influx of visitors from April-August it may take businesses reliant on tourism more than 6 months, as is the modal (32%) response, to experience this upturn in visitors and return to the ‘usual’ by very nature of their business rather than an aftermath of Covid-19.

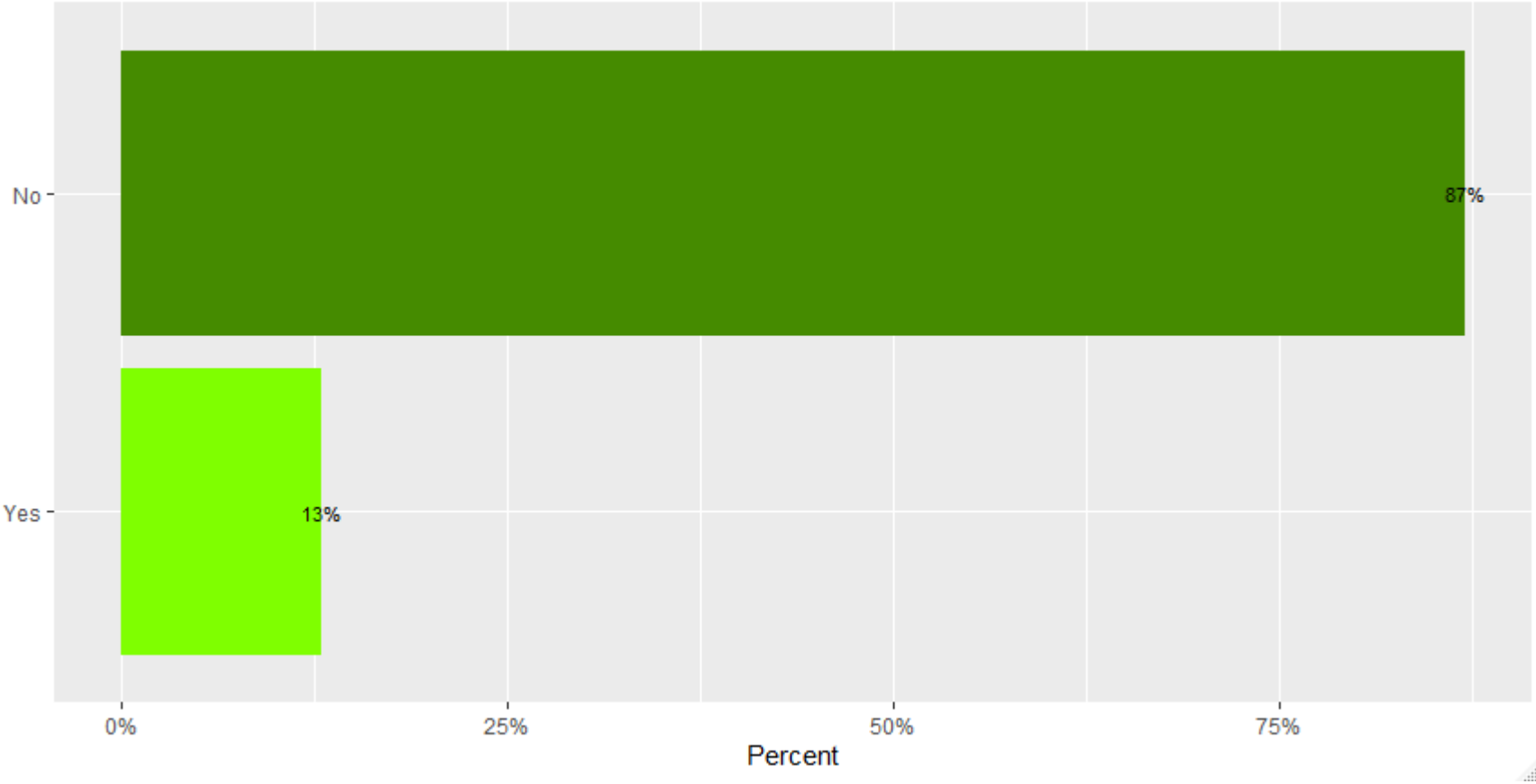
This clearly does not explain the 19% of businesses saying it will take longer than 12 months to return to normality.





VISIT NOTTINGHAMSHIRE

Q34 Have you come across examples of people working together to innovate which has had a positive impact?



Visit Nottinghamshire's newsletters were very helpful, community groups work and how people adapted

Nottstopping festival and NottGoingOut campaign

Digital assets online. Support for businesses from community.

Other responses were around success with telecommunication services; Zoom, Facebook, apps, online systems, newsletters, virtual platforms and so on.





Q34 – more examples

Examples of diversification, assisting front line workers, raising funds for charitable organisations.

Communication of latest updates was very helpful.  
Communities working together to support one another.

Small business working together to offer better guest experience, restaurants changing to delivery services + wholesale suppliers now delivering to domestic homes to support people at home.

Many voluntary activities are helping morale.

Local businesses buying local produce.

Making and donating cloth face masks.



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