

## **COVID-19 Impact on Tourism Industry Business Survey – Summary of results**

In this latest version of our coronavirus tourism industry business survey, we focused on identifying any issues businesses are having with accessing support, and asking for their views on priorities for the national tourism recovery plan.

The additional questions added this time are about how best to support the tourism industry when we get to recovery stage will help shape VisitWiltshire's submission to the All-Party Parliamentary Group for Hospitality and Tourism and their 'Pathways to Recovery' inquiry.

The Survey was sent out to businesses by email and VisitWiltshire's regular b2b newsletter on Wednesday 22 April and the deadline to complete the survey was Monday 27 April. We had a total of 76 responses before the deadline and these were received from a representative scope of Wiltshire tourism businesses.

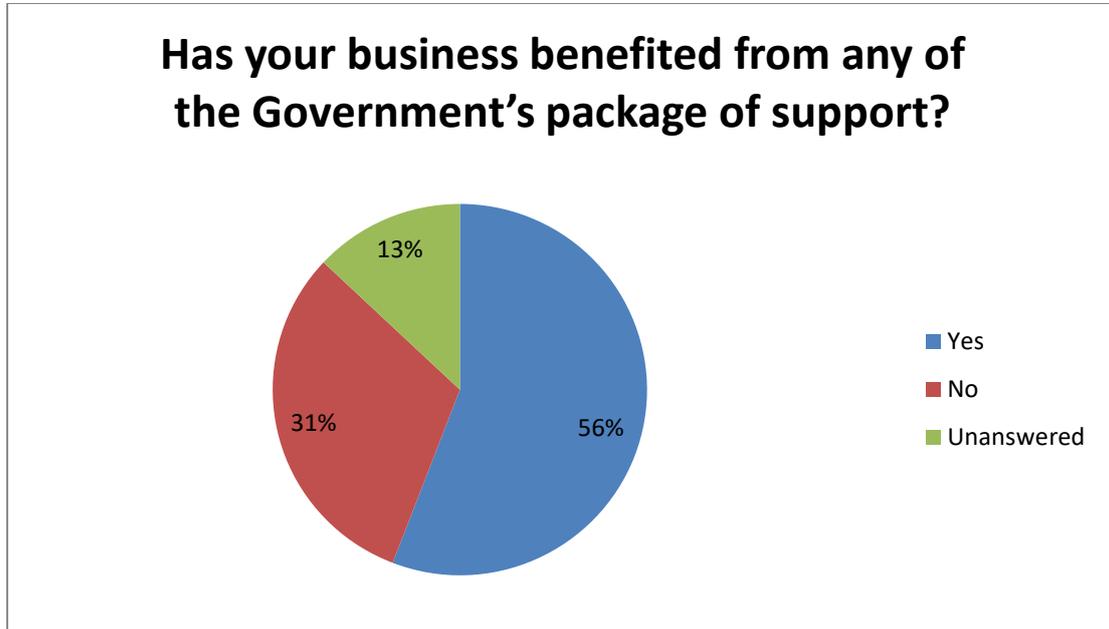
### **Summary of Results**

The main findings from this survey include

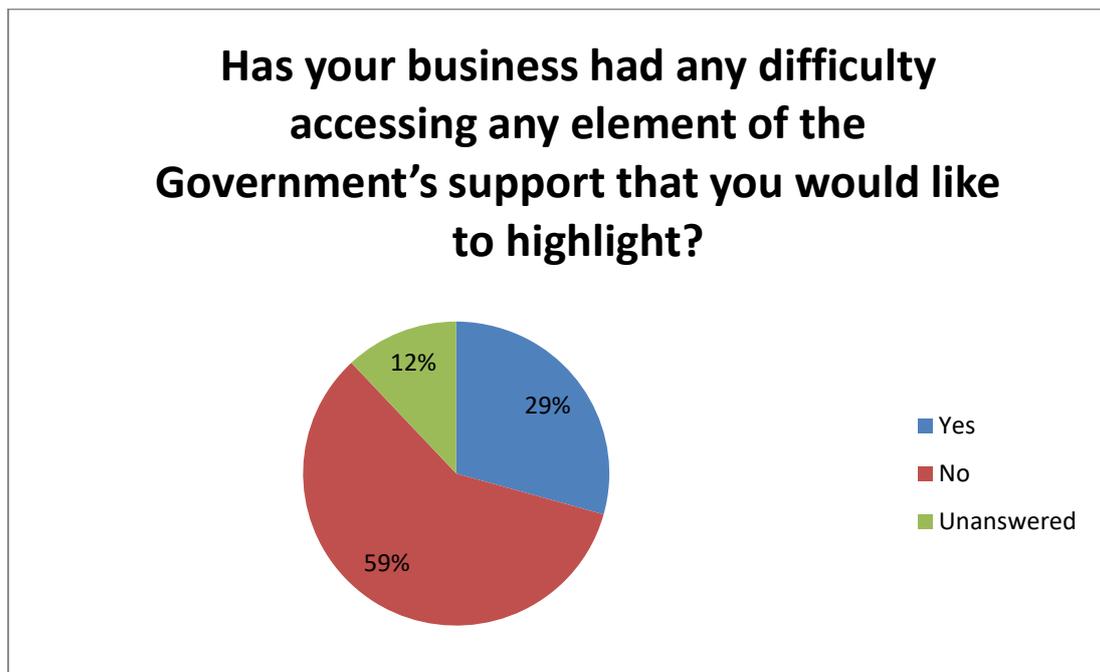
- Government Financial Aid has been in most part welcome and Wiltshire Council have been commended on their efficiency in processing grant applications and prompt payment to the successful business. 55% of business who replied to the survey have received some form of government support. However, many businesses feel the amounts offered are still insufficient and won't last long enough. Also, there appears to be a lack of clarity of around applications and when or if money will be received. There is also a feeling that the use of business rates as the arbitrary factor in qualification for grants, is unfair on many tourism businesses as they either don't pay rates or are over the 51k threshold.
- Many tourism businesses will be amongst the last to open and the knock on effect of lack of forward booking and a potential new mistrust in people gathering together, has put in many in fear that they will be left behind once lockdown restrictions are lifted.
- It is clear that plenty of advance warning needs to be given of when businesses can once again open. This needs to be alongside clear rules on social distancing and guidance on cleaning and reassurance that PPE and cleaning product will be available for staff
- The furloughing scheme needs to be extended further and then to be phased out rather than suddenly stopped, as businesses may not be able to afford to fully staff immediately or will be running at a reduced capacity.
- Most businesses say they are going to receive nothing from their insurance companies to cover any loss of business
- Losing main season business will make it hard for many businesses to survive the winter. Most are not expecting to have marketing budget this year. Help with marketing now and post recovery is essential.
- Most businesses are still understandably focusing on short-term survival but those looking ahead to recovery have highlighted the need for a very significant tourism marketing recovery campaign. Focused initially on domestic.

Brief summaries of the responses to each question

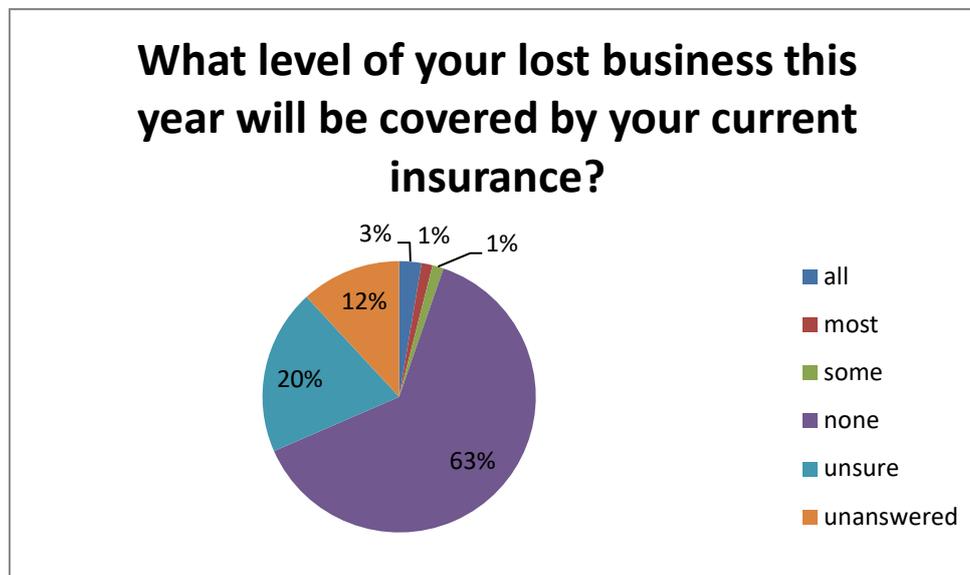
Question 1 - Has your business benefited from any of the Government's package of support? Yes or No.



Question 2 - Has your business had any difficulty accessing any element of the Government's support that you would like to highlight?



**Question 3 - What level of your lost business this year will be covered by your current insurance?**



- As these results show the vast majority of businesses are receiving no insurance cover from their providers for loss of business. The main reason given is; that they are not covered for loss of business due to COVID-19 or a pandemic in their policy.
- Those who have selected 'unsure' are mostly still waiting to hear back after making claim. So the numbers of 'none' responses are likely to rise.

**Question 4 – What further, or continued, financial measures do you envisage your business needing from Government in the recovery period when restrictions begin to be lifted?**

- 27% respondents have said they will require further financial help whether this is in the form of grants, cash support, or any other form of help will be welcome. The current schemes are helping, but won't last long enough.
- 20% of those who answered this question focused on the furlough scheme. They are hoping for a further extension and for the scheme to be phased out rather than suddenly stoppe.
- There was also a clear need for government guidance on how to re-open and operate safely (social distancing) once lockdown lifted. An award or 'badge' to signify business is safe to use will also be welcomed

**Question 5 - What financial or other measures should be taken to boost business in the hospitality and tourism sectors in the immediate aftermath of COVID-19 restrictions being lifted?**

- 18% of those who answered this question said an extension on loan repayments, corporation tax, extension of interest free period of loans and a reduction in VAT would be welcome.

- There was more of a focus on the importance of marketing and promotion, encouraging both international and domestic visitors to the UK. 16% of answers to this question mentioned marketing in answer to this question.

**Question 6 - What impact would a staggered reopening have on your businesses? For example, if businesses are permitted to reopen but with existing social distancing measures retained; hotels open with no bar or restaurant area; or a cap being introduced on venue numbers.**

- Of those who answered this question 25% feel that staggered opening and operating under social distancing would have a significant or detrimental effect on business and that social distancing would be impossible to enforce
- 23% are confident they can open their businesses partially under social distancing.
- 19% are confident they can re-open under social distancing and make it work, despite reduced numbers and with some further financial help and advice
- 12% of replies pointed out that it would be possible for them to re-open under social distancing rules practically; however it won't be financially viable

**Question 7 - What specific operational difficulties do you anticipate when looking to reopen your business and will you need assistance and guidance ahead of this?**

**75% of people answered this question**

- The main issue highlighted by the responses to this question is concerns over ensuring that proper cleaning practices are in place and businesses can ensure safety of both customers and staff. They want to be reassured that government advice will clearly define the procedures that need to be in place and the correct cleaning and PPE equipment will be available

**Question 8 - When you reopen, will you be able to reassure visitors you'll have social distancing measures in place?**



**Question 9 - What, if any, further guidance do you feel that you need ahead of reopening, for example on cleaning and hygiene measures, social distancing, marketing and messaging, training?**

**64% of people answered this question**

- 26% of the replies stated they won't need any further guidance or there is already enough information
- 16% of replies stated they will need guidance on all of the above
- 22% stated they need further guidance on cleaning and hygiene measures
- 14% would like help and advice on marketing and messaging
- 6% would like to be provided with necessary training opportunities

**Question 10 - How long will it take for your businesses to change or reactivate your supply chains and what difficulties might you have in doing this?**

- 32% of the businesses who answered believe that they will be able re-activate almost immediately and within 1 week. Another 9% stated it wasn't applicable or ever an issue for them
- 25% are not sure on when or how the supply lines will be reactivated
- 6% predict it will take a few weeks or up to a month
- 4% are predicting not to be back to normal in the next 6 – 18 months
- 4% of the business who replied are still open in some capacity and therefore still using their supply chain

**Question 11 - What other support / advice / guidance do you need / can we help you with?**

**44% of people answered this question**

- 17% said that they didn't require any further help or are happy with what we are currently doing
- 11% stated they still need help accessing grants and other financial help
- 11% stated they would benefit from VisitWiltshire's help with marketing and advertising
- 10% aren't yet sure, and will need to wait for future developments