

## Welcome to Yorkshire members survey – COVID-19 recovery

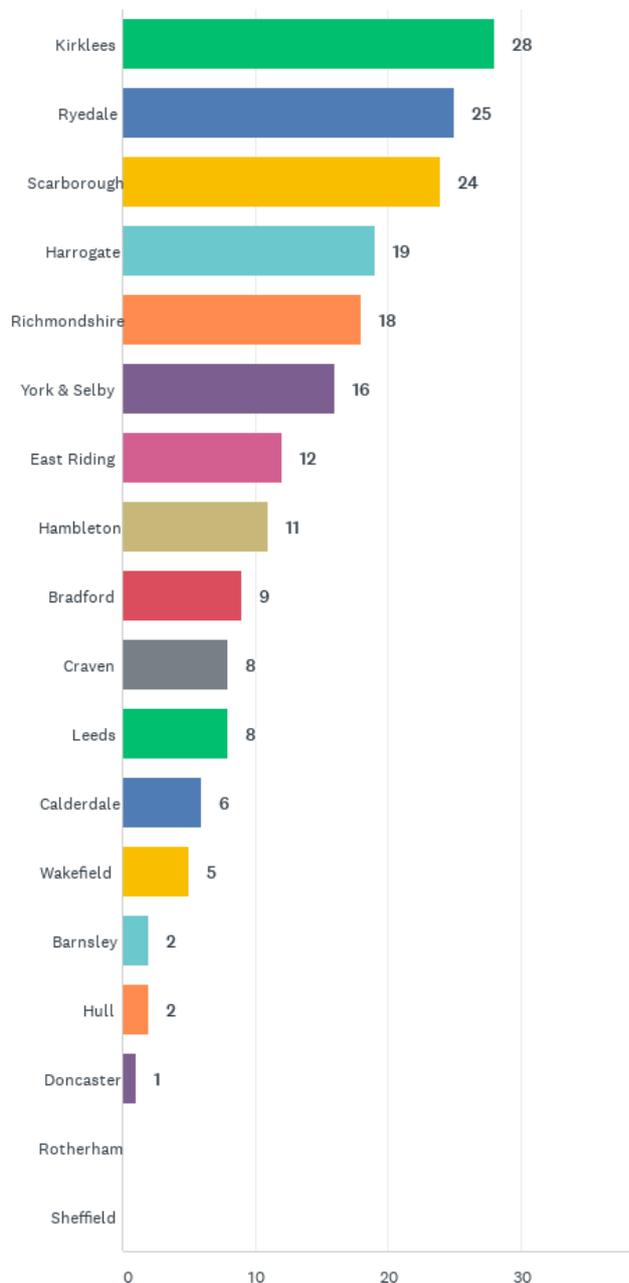
From Wednesday 6<sup>th</sup> May Welcome to Yorkshire invited Yorkshire businesses to complete a survey regarding the impact that they believe COVID-19 will continue to have on their operations. The survey was promoted through the Welcome to Yorkshire industry database via email, industry social media and through a pop-up notification on Yorkshire.com. The survey is now closed.

In total 194 responses were received. The following information summarises the questions asked in the survey, and the responses received. A summary of results can be found below, however business details are not disclosed.

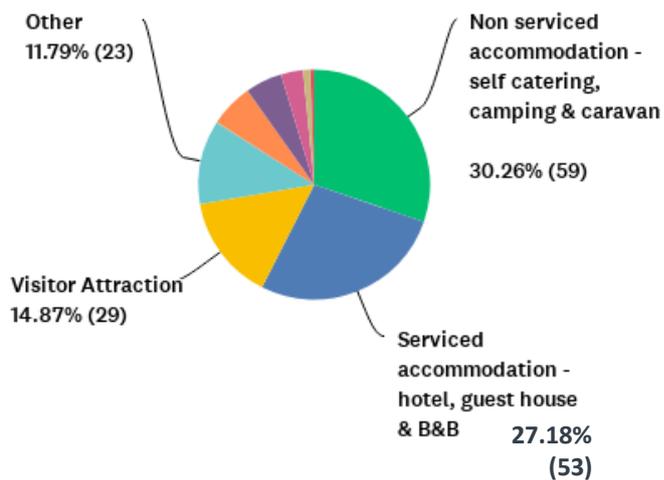
### Q1 Business Name

### Q2 Location of your Business

### Q3 Local Authority/District



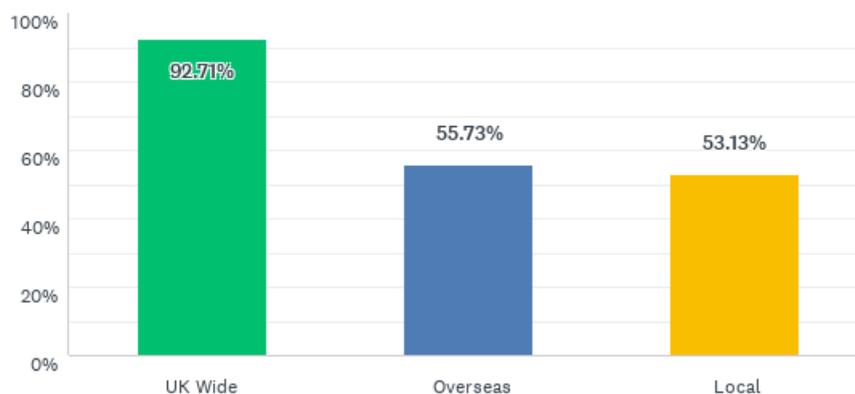
#### Q4 What type of business do you own/manage?



#### Q5 Number of Employees

144 respondents employ between 0-9 members of staff, 29 employ between 10-49 and 20 employ 50+.

#### Q6 Origin of Visitor



#### Q7 What are your main issues relating to reopening post COVID – 19?

- Lack of attractions open for visitors  
Will other businesses and places be open for visitors? Impact of staff social distancing means reduced offerings, want to be able to help other businesses survive but can't if they're closed, limited experience for visitors.
- Impact of visitors on local area  
Too many people coming to area, managing visitor flow, too many visitors to start with, will our guests be welcomed by the locals, will large gatherings be allowed, re-engaging community, attracting new visitors, how to deal with customers that do not abide by the rules of social distancing etc laid down by the government, potential abuse of staff if they have to ask customers to abide by guidelines.
- Timings and notice of being able to reopen  
When we can open – we have the space and facilities, government advice on when to reopen, lack of clarity or guidelines / timescales to plan to, no dates set, obtaining guidelines from government it's safe for us to open, industry standards would be helpful - but it is very different when you are the sole-employee. Confused Government guidance. Not knowing

when, it is difficult when managing existing bookings and dealing with guests. Will it be gradual? Being given enough notice. Needing clear guidance on expectations on social distancing, cleanliness and for our sector from the Government.

- Issues around social distancing regulations that may be put in place  
How to maintain social distancing, and the difficulties of it. Safety versus logistics, e.g serving breakfast, for multi-use venues, serving food 2m apart, seated venues, managing browsing, shared facilities, will some implement stricter policies that customers then expect? Managing longer turnaround times, will rooms need to be vacated for longer periods to ensure safe? Lack of clarity on what the rules will be. Ensuring staff, customers, animals, neighbours, selves are safe. Logistics of staff returning, elderly volunteers, operating with high risk family members. Virus being brought into business and liability if customer catches it. Closure if someone has symptoms, how to know? Increased costs of extra cleaning, PPE, will this be readily available? Operating at reduced occupancy. Risk assessments for closed buildings. Finding creative solutions.
- Lack of visitors wanting to, or being able to travel  
Customer fear, lack of customers, confidence, loss of business, loss of business during crucial summer season, low demand, sustaining business during lockdown, achieving bookings, no weddings, guests willing to travel, visitors feeling confident and safe, marketing that it's safe to staycation, being wary, reduction in number of business guests, likelihood of bookings for large groups as people are nervous to travel. Will the public holiday in the UK this year or save up for travel abroad in 2021 or even will people be able to afford to holiday this year? Being able to market ourselves in a competitive world with a very small budget? Will there be enough support for Welcome to Yorkshire and other tourism organisations for the off-peak season, particularly rural businesses like ourselves?
- Financial issues  
Business viability during initial months, no income, reduced capacities restrict revenue, will we be able to operate as required, ongoing rent costs, cash flow, no funding, insurance cover, lack of grant eligibility, outgoings still owed, guests won't have the money to spend, reduced revenue due to fewer people being accommodated, priority to break even, retaining staff during quieter months, spending money on supplies that might go out of date, people expecting discounts, overstaffing meaning high staff costs and potential redundancies, as a hospitality consultant all clients are unable to pay me at this time. Clients returning to work, team retention, paying staff due to low footfall and sales, continued furloughing, financially rescheduling cancellations knock on effect on new bookings for foreseeable. Need a more flexible furlough system to 're-employ' staff as will struggle to offer them full time work again straight away, already very seasonal – glamping, uncertainty of taking long term bookings, Incorrect CMA guidance published saying accommodation providers should be acting as insurers and refund bookings who have no insurance. Refunding guests, rescheduled guests, giving free stays to those affected, cash flow, we have not been able to go through a management company as yet as staff are furloughed. Guests booking but refusing to pay a deposit. Limited places anyway for animal welfare purposes, so reducing these down really limits revenue. Credit vouchers given as could not refund deposits for bookings made during the time we have been closed; all these customers are to fit in along with full paying customers. Currently most of our clients are closed or unable to operate normally and therefore are not purchasing the type of items we supply.

**Q8 What insights can WTY support you with to aid your recovery?**

- Marketing  
 Promotion, marketing, supporting independent business, share safe places to visit, (free) advertising, support specific campaigns ie Support National Time Out. Allow a slower gradual opening with bars and restaurants not opening until it is fully safe. Reviews. How to encourage visitors, particularly for small businesses who do not have marketing budgets. Free marketing via website. Promoting Yorkshire to overseas operators and help bringing overseas visitors. If places cannot open, we wouldn't want disappointed visitors as this could backfire. Overlooking urban/semi-rural market towns. Let us know what your marketing ideas are. Put Canal Hire Boats on your radar and within your knowledge. Be proactive. Aggressive media advertising of low-density Glamping sites. Discounts/free tickets.
- Support and advice on reopening  
 How to reopen, when other businesses are reopening, what others are experiencing, support on reopening, benchmarking reports for other venues, don't encourage day trips yet, how to welcome guests safely, Practical help of ideas of how to overcome problems, Advice on liability if someone catches Covid-19 whilst staying. Advice on how you serve food and drink and socially distance. Advice on cleaning requirements to protect staff and guests. Understanding of what other businesses are planning. Would like info on how long virus can live in linen, how to deal with customers that do not play by the rules, guidance and notices made general across the board for self-catered properties. Advise for a legal disclaimer moving forwards. Advice on cancellation policies /risk free holidays, encouraging visitors to visit the countryside. A clear and concise guideline for reopening the leisure industry, specific to each sector. Practical guidance re organising people for a workshop. Template check list for all sectors. How to attract new bookings, advice on gaining visitor confidence.
- Comms and official industry updates  
 Better comms, regular updates on how you are supporting tourism. Updates from the industry, and sector specific (arts, hospitality), visitor figures, shared strategies, by having a strategic view of sustainable tourism within Yorkshire. Grants and funding information. Keeping us up to date in a concise format with the latest recommendations, regulations from Government, often buried in one size fits all statements and papers. A 'reopening toolkit' containing templates of useable risk assessments, directives created and scrutinised by professionals involved in Health & Safety and Legal matters. Complement rather than replicate national insights. Warn far in advance of opening dates. Central online source for all support documents and advice. Travel statistics and information from other countries reopening tourism. Advice from Visit Britain on how to tour guide with restrictions.
- Visitor stats  
 Customer issues, what they're worried about, public opinion on reopening, visitor sentiment and (in region audience specifically). Run surveys to let us know what the demand may be for a break/holiday in Yorkshire as we need to determine numbers. Creating a 'One Link' (www site) which relates to each portion of a region that has specific post Covid-19 info on - that we can directly send to those enquiring OR put on our website in order to encourage people to specifically be attracted to our direct geographical area. Moving onto online selling as accepting visitors for a while is going to be difficult.
- Sharing contacts / collaboration  
 Sharing contacts, collaborative methodology for working in tourism. How a small business like ours can work collaboratively with other members. Encourage a mentor scheme where large businesses can support small businesses with their ways of working and how they are planning for recovery etc.
- Information on timescales  
 When can we reopen, info on how people would see socially distanced events taking place? When will "mass gatherings" be acceptable?

- Campaigning / lobbying

Campaign for continued financial support if some sectors can't open, encourage and lobby government to allow holiday home visits. Lobbying of central government for additional funding both in the short term and to aid recovery. Lobbying for self-employed B&B owners who need to shield. Establish consistent practice across the industry on cancellations by B&Bs due to a case of Covid-19. To continue to support business and be a strong voice for the region. Lobby for visitor attractions to open. To clarify the government message which to date has been of confusion to the public. Lobbying ministers re the CMA. Working to find viable solutions for operation for reopening for tourism and accommodation. Making sure Government and visitors are aware that rural glamping sites with no communal areas and high standards of cleaning will be some of the safest places to stay once they can reopen. Can you ask that self-catering properties be safely opened before other hospitality units? Ensuring furlough money continues. Leadership with central government and support.

### **Q9 What do you see as the major challenges post COVID- 19 for your business?**

Answers combined with question 7.

### **Q10 What promotional activity would you like to see from WTY and to who?**

- Promoting Yorkshire to local and national domestic market, day visits and short breaks
- Up to date information on what is open, in one easy to find central place on the website
- Safety information for visitors, promote safe travel – getting away from the crowds, self-catering, healthy outdoors
- Target those who don't usually visit
- National TV campaign
- Printed marketing in newspapers, magazines and leaflets
- Don't advertise the brand through large but one-off events
- Assistance in using the website to promote listing
- More inclusive for SMEs / support for independents / promote supporting local
- Free advertising
- Use nostalgia in campaigns
- Promotion of smaller places, and more even promotion across Yorkshire
- Better booking capabilities on website, promote direct booking

### **Q11 Are there ways for your business to continue to make money at this current time?**

Most people answered no, although some have been able to focus on online, delivery and takeaway options, or opening to key workers.

### **Q12 Where do you expect the origin of visitor to be post COVID – 19?**

Most people answered from within the UK, many answered that visitors would be local from within the region / 1-2 hours drive / urban areas.

### **Q13 What will the long terms consequences of COVID – 19 to your business?**

- Dependent on economic recovery, financial recovery, slow recovery, closure
- Reduced revenue, lost profit, lack of reserves, increased supply costs, increased insurance costs, debt management/ financial challenges from prolonged lack of income, higher taxes to pay off national debt, cash flow issues, can future insurance cover us?

- Reduced numbers of customers, having to build consumer confidence
- Reduced workforce, job losses, unemployment
- Impact of lack of funding for improvements, delay in development, building repairs put on hold, less investment, Re-investing in equipment and a new website to make us more efficient and therefore grow (projects which were on the verge of completing)
- More people holidaying in UK, increased day trips, fewer overseas visitors, busy in 2021, good because of projected strength of domestic tourism market, Attracting visitors from overseas,
- Realisation of self-care and looking after selves
- Changed shopping practices, competitive prices from larger retailers,
- Changing use of holiday lets to residential
- Changes to processes / offering,
- Had time to streamline processes, rethinking and different emphasis, more sustainable and diverse range of products, what additional business can we generate out of season? Might be able to have a positive outcome as we have used this time "off" to re-brand and re-design the whole business. More flexible working. Opportunity to look at efficiencies and waste, and how we can do things better when starting back up, with new ideas and new ways of working. This may seem odd - it is bad for our core business, but there may be new, unexpected opportunities - IF we survive the next 6 months.

**Q14 Do we have your permission to share your responses with our Local Authority partners in Yorkshire. If yes please opt in.**

