
Cumbria


Newcastle & Gateshead


County Durham


Liverpool


Manchester


York


Cheshire


Leeds


Lancashire

NatWest Group

marketingManchester

NatWest North of England Tourism Business Barometer 2021

Final Wave
September 2021

Marketing Manchester

Image credits

The images used on the first page of this document are sourced from the following organisations:

- ‘Cumbria’ - Cumbria Tourism
- ‘Newcastle & Gateshead’ - NewcastleGateshead Initiative
- ‘County Durham’ - Visit County Durham
- ‘Liverpool’ - Marketing Liverpool
- ‘Leeds’ - Visit Leeds
- ‘York’ - Make It York
- ‘Cheshire’ - Marketing Cheshire
- ‘Manchester’ - Marketing Manchester
- ‘Lancashire’ - Marketing Lancashire

Overview

- The NatWest North of England Tourism Business Barometer has been supported by the NatWest Group since July 2020.
- The Barometer has been carried out in waves amongst a consistent sample of tourism businesses, including accommodation providers and attraction operators.
- The on-line survey of tourism businesses has continuously measured shifts in employment, trends in business levels and revenue and business confidence.
- The Barometer is coordinated by Marketing Manchester and facilitated through a network of Destination Management Organisations and Tourist Boards across the North of England.
- This is the final report in the series.

Destination Management Organisations

The following Destination Management Organisations are participating in this barometer:

- Cumbria Tourism
- Make It York
- Marketing Cheshire
- Marketing Lancashire
- Marketing Liverpool
- Marketing Manchester
- NewcastleGateshead Initiative
- Visit County Durham
- Visit Leeds

Fieldwork schedule

NatWest Group

Wave	Fieldwork	Delivery	Circulation
Wave 1 - February	w/c 08 February 2021	w/c 15 February 2021	w/c 22 February 2021
Wave 2 - March	w/c 08 March 2021	w/c 15 March 2021	w/c 22 March 2021
Wave 3 - April	w/c 05 April 2021	w/c 12 April 2021	w/c 19 April 2021
Wave 4 - May	w/c 03 May 2021	w/c 10 May 2021	w/c 17 May 2021
Wave 5 - June	w/c 31 May 2021	w/c 07 June 2021	w/c 14 June 2021
Wave 6 - September*	w/c 30 Aug 2021	w/c 06 September 2021	w/c 13 September 2021

*Originally due to take place July 2021 but was delayed until September 2021 to gain a better understanding of post-lockdown recovery levels.

Accompanying notes for current wave

NatWest Group

- The fieldwork for this final wave was undertaken 31 August to 06 September, six weeks following the remaining restrictions in the sector being lifted on 19 July, and at a point where, on average, business for the sector is traditionally strong due to the peak summer holiday season.

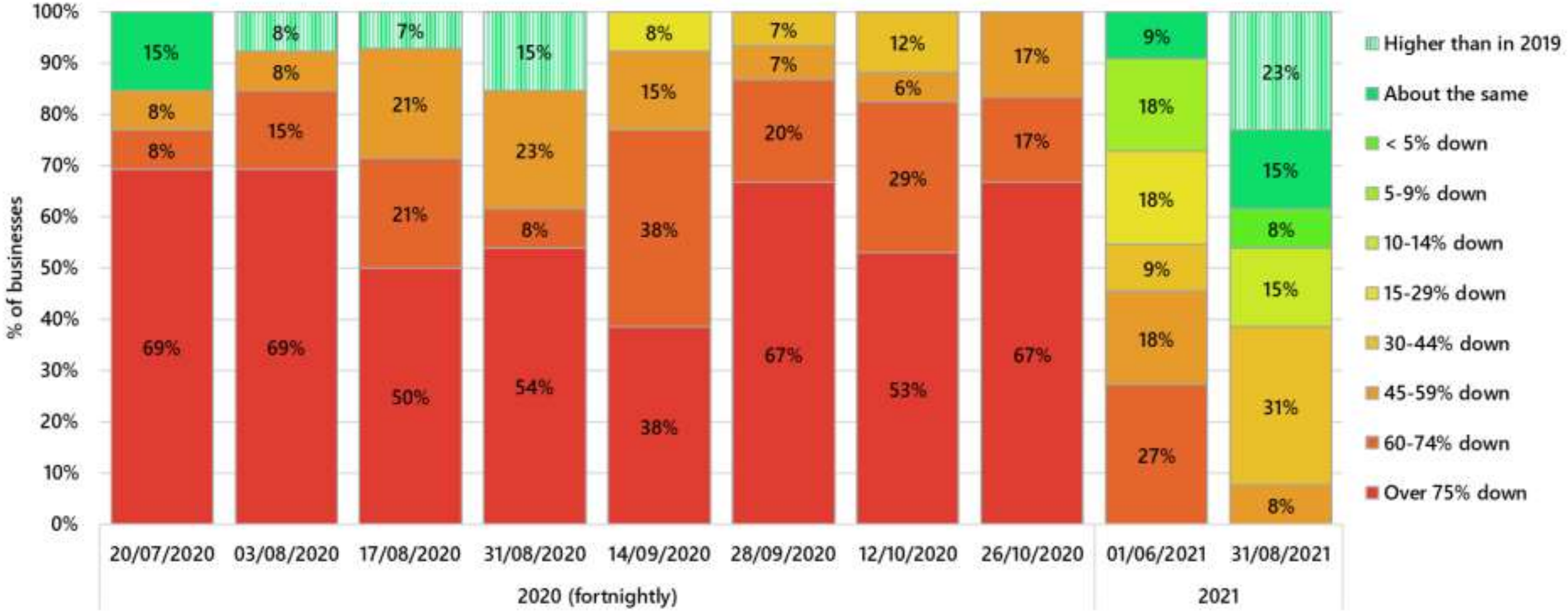
marketingManchester

Key comparator metrics

NatWest Group

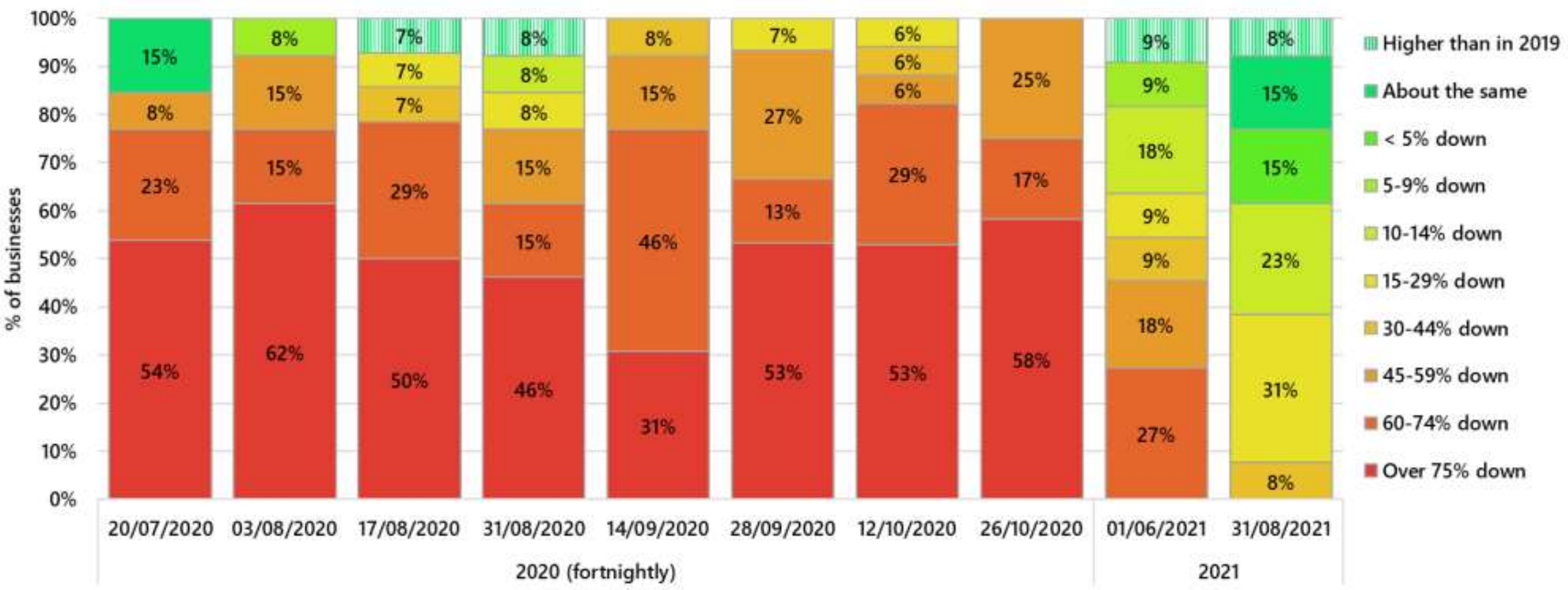
Measure	Manchester	Northern
% reporting revenue over the last fortnight is at or above 2019 (pre-pandemic) levels	38%	67%
% reporting revenue over the last fortnight is at least 30% down on 2019 (pre-pandemic) levels	38%	15%
% reporting visitor numbers over the last fortnight are at or above 2019 (pre-pandemic levels)	23%	58%
% reporting visitor numbers over the last fortnight are at least 30% down on 2019 (pre-pandemic) levels	8%	8%
% reporting that advanced bookings for September are at or above 2019 (pre-pandemic levels)	33%	70%
% reporting that advanced bookings for September are at least 30% down on 2019 (pre-pandemic) levels	17%	13%
% reporting that advanced bookings for Oct-Dec are at or above 2019 (pre-pandemic) levels	25%	55%
% reporting that advanced bookings for Oct-Dec are at least 30% down on 2019 (pre-pandemic) levels	25%	20%
% reporting business viability concerns	7%	9%
% reporting to have employees supported by the CJRS in September	13%	14%
% expecting to have fewer permanent positions in October 2021, than in February 2020	67%	43%
% expecting to have more permanent positions in October 2021, than in February 2020	7%	10%
% increased pay over and above usual levels within their business	87%	68%

Revenue levels compared to 2019



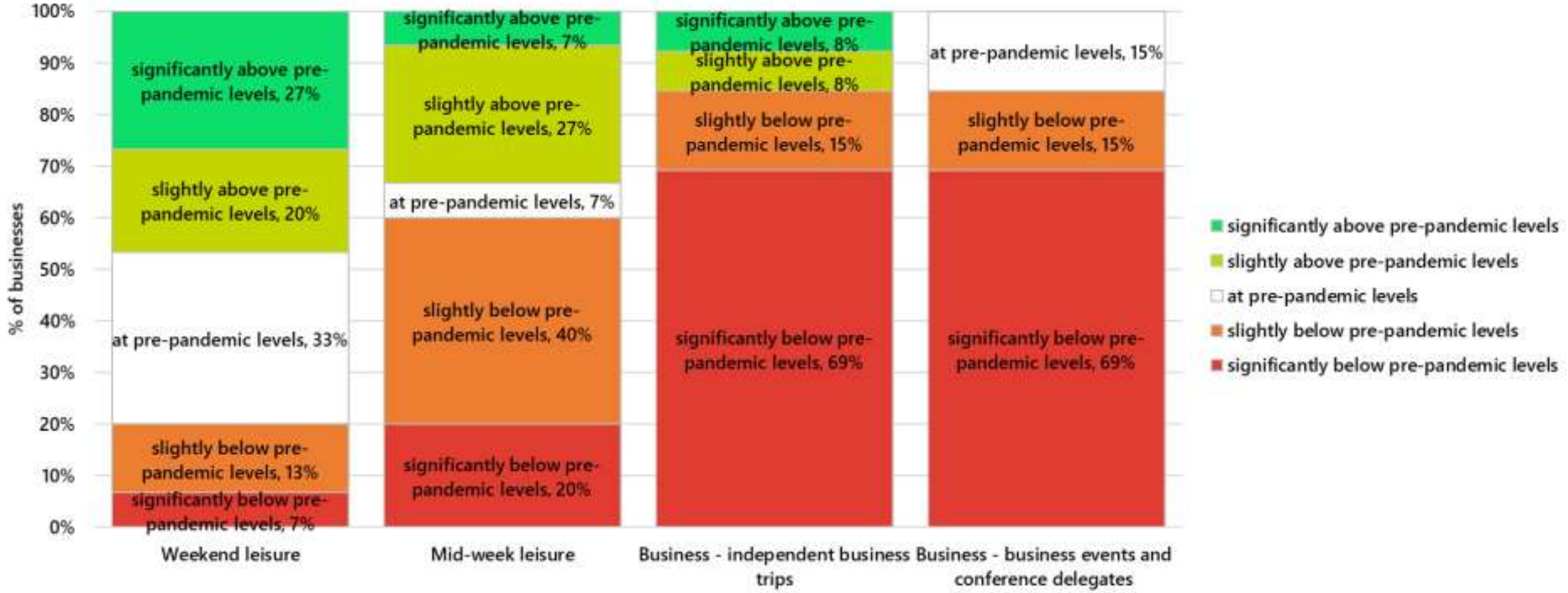
Q Looking back over the past two weeks, how does your total revenue from all business areas compare to the same period in 2019, pre-pandemic? Single response.
Over 75% down | 60-74% down | 45-59% down | 30-44% down | 15-29% down | 10-14% down | 5-9% down | less than 5% down | about the same | revenue is higher than the same period in 2019 | The business wasn't open in August 2019.
Samples (excluding those unable to give a comparison):
20/07/2020: 13 | 03/08/2020: 13 | 17/08/2020: 14 | 31/08/2020: 13 | 14/09/2020: 13 | 28/09/2020: 15 | 12/10/2020: 17 | 26/10/2020: 12 | 01/06/2021: 11 | 31/08/2021: 13.

Visitor numbers compared to 2019



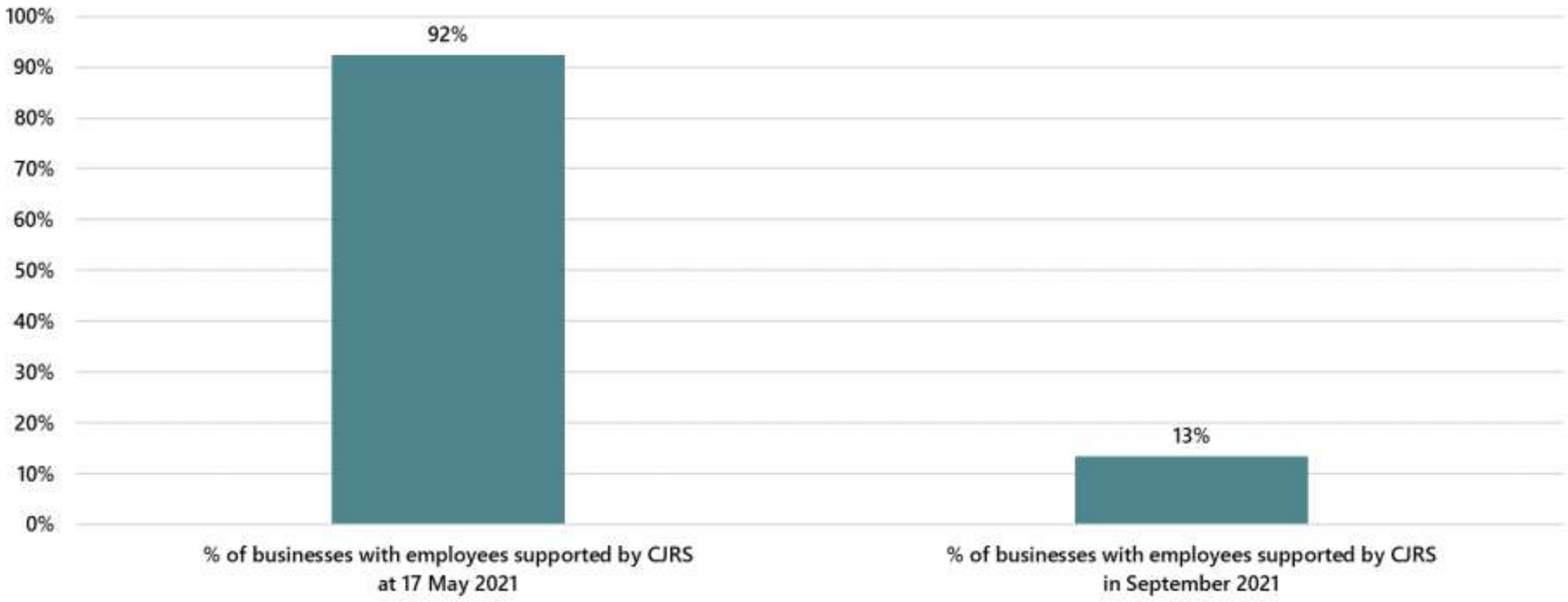
Q Looking back over the past two weeks, how do visitor numbers/footfall compare to the same period in 2019, pre-pandemic? Single response.
Over 75% down | 60-74% down | 45-59% down | 30-44% down | 15-29% down | 10-14% down | 5-9% down | less than 5% down | about the same | visitor numbers are higher than the same period in 2019 | The business wasn't open in August 2019.
Samples (excluding those unable to give a comparison):
20/07/2020: 13 | 03/08/2020: 13 | 17/08/2020: 14 | 31/08/2020: 13 | 14/09/2020: 13 | 28/09/2020: 15 | 12/10/2020: 17 | 26/10/2020: 12 | 01/06/2021: 11 | 31/08/2021: 13.

Current business levels – leisure v business



Q Generally speaking, how is business from each of the following? Weekend leisure | Mid-week leisure | Business – independent business trips | Business – business events and conference delegates. Single response.
Significantly below pre-pandemic levels | slightly below pre-pandemic levels | at pre-pandemic levels | slightly above pre-pandemic levels | significantly above pre-pandemic levels | no comparison available | not applicable to our business.
Sample included in categories shown on chart: weekend leisure: 15 | mid-week leisure: 15 | independent business trips: 13 | business events and conference delegates: 13.

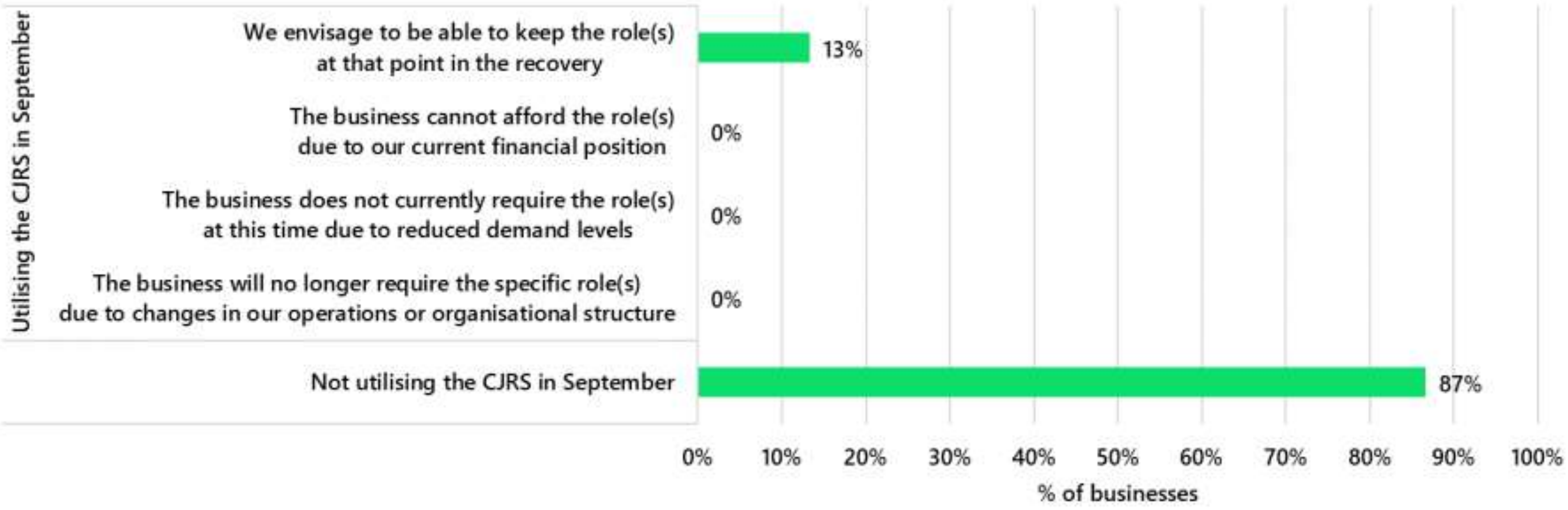
Utilisation of the CJRS



Q Does your business expect to have any employees on furlough through the government's Coronavirus Job Retention Scheme after 17 May? (17 May marking when serviced accommodation could legally re-open).
Q Does your business have any employees being supported by the Coronavirus Job Retention Scheme during September? Single response. Yes | No.
Early May 2021 wave: n=13 businesses.
Early Sept 2021 final wave: n=15 businesses.

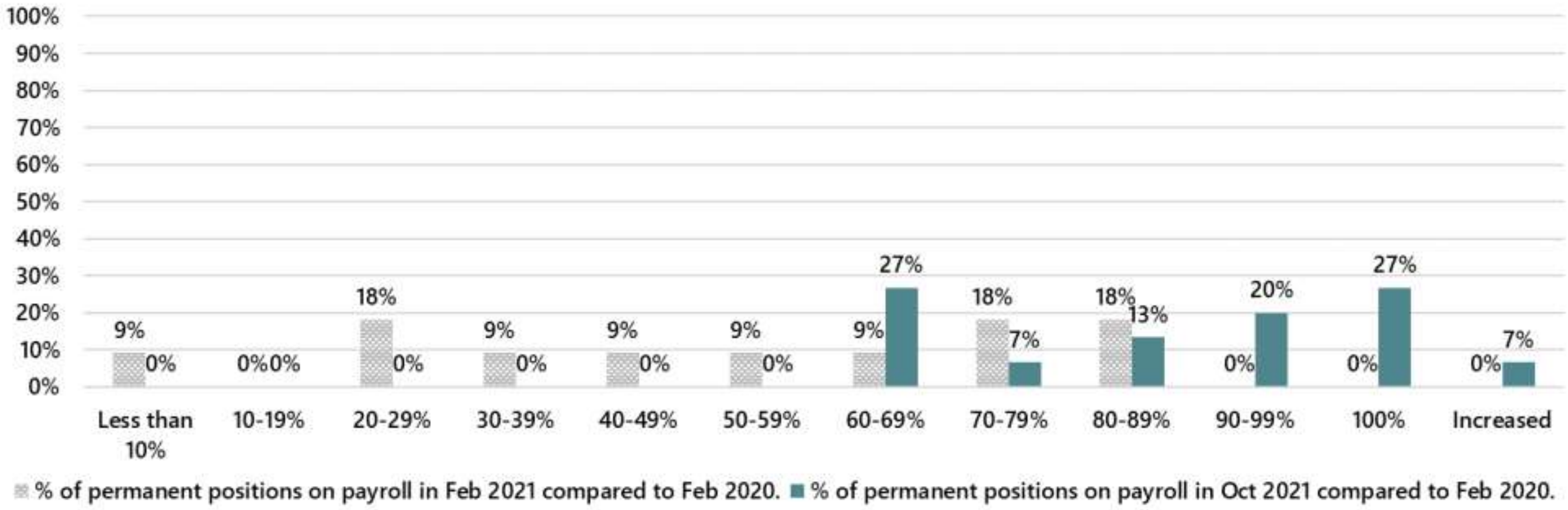
CJRS outcomes

NatWest Group



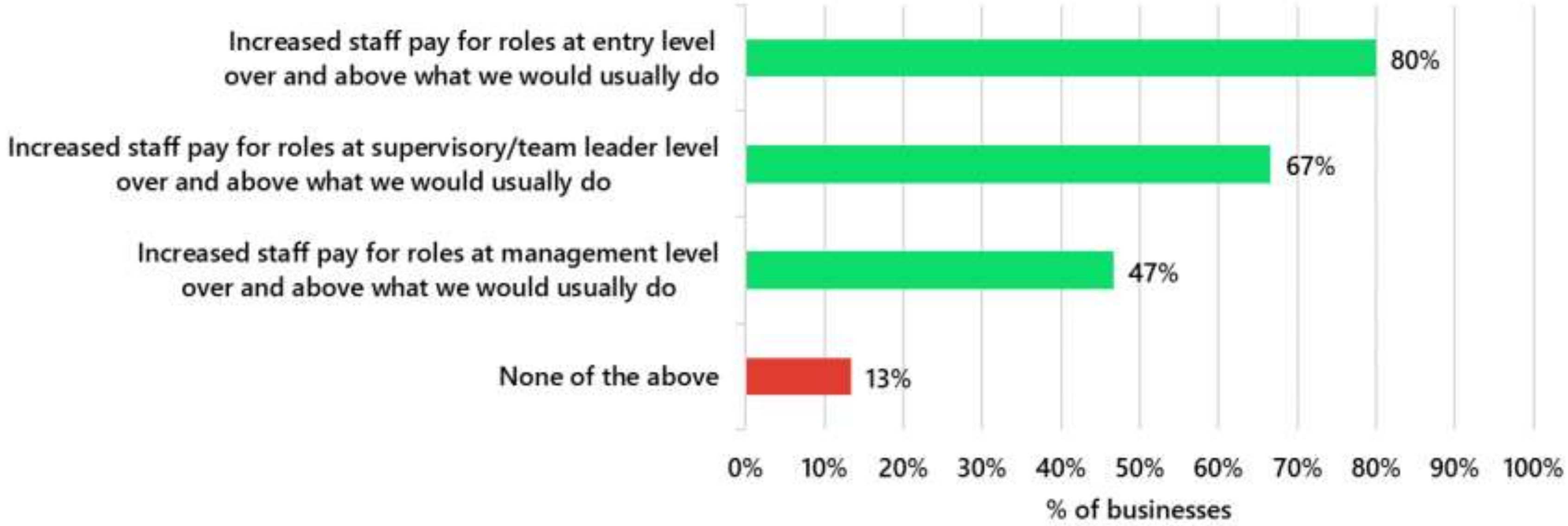
Q You have indicated that you have employees supported by the CJRS for September… What is expected to happen to these employees at the end of September when the scheme comes to an end? Please select as many as are applicable to the roles within your business? Multiple response available.
The business will pick up salary/wage costs as we envisage to be able to keep the role(s) at that point in the recovery | The business will no longer require the specific role(s) due to changes in our operations or organisational structure | The business does not currently require the role(s) at this time due to reduced demand levels | The business cannot afford the role(s) due to our current financial position | Other – please specify.
n=15 businesses shown in the chart including the two businesses (13% of the sample) asked the follow-up question and utilising the CJRS in September.

Staffing levels



Q What % of permanent staff positions were on your payroll February 2021 compared to February 2020 (pre-Covid)? If the number has actually increased please indicate 'Not applicable – it has increased'. Verbatim response.
Q What % of permanent staff positions will be on your payroll October 2021 compared to February 2020 (pre-Covid)? If the number has actually increased please indicate 'Not applicable – it has increased'. If the number is the same please enter '100%'. Verbatim response.
Early March 2021 wave: n=11 businesses.
Early Sept 2021 final wave: n=15 businesses.

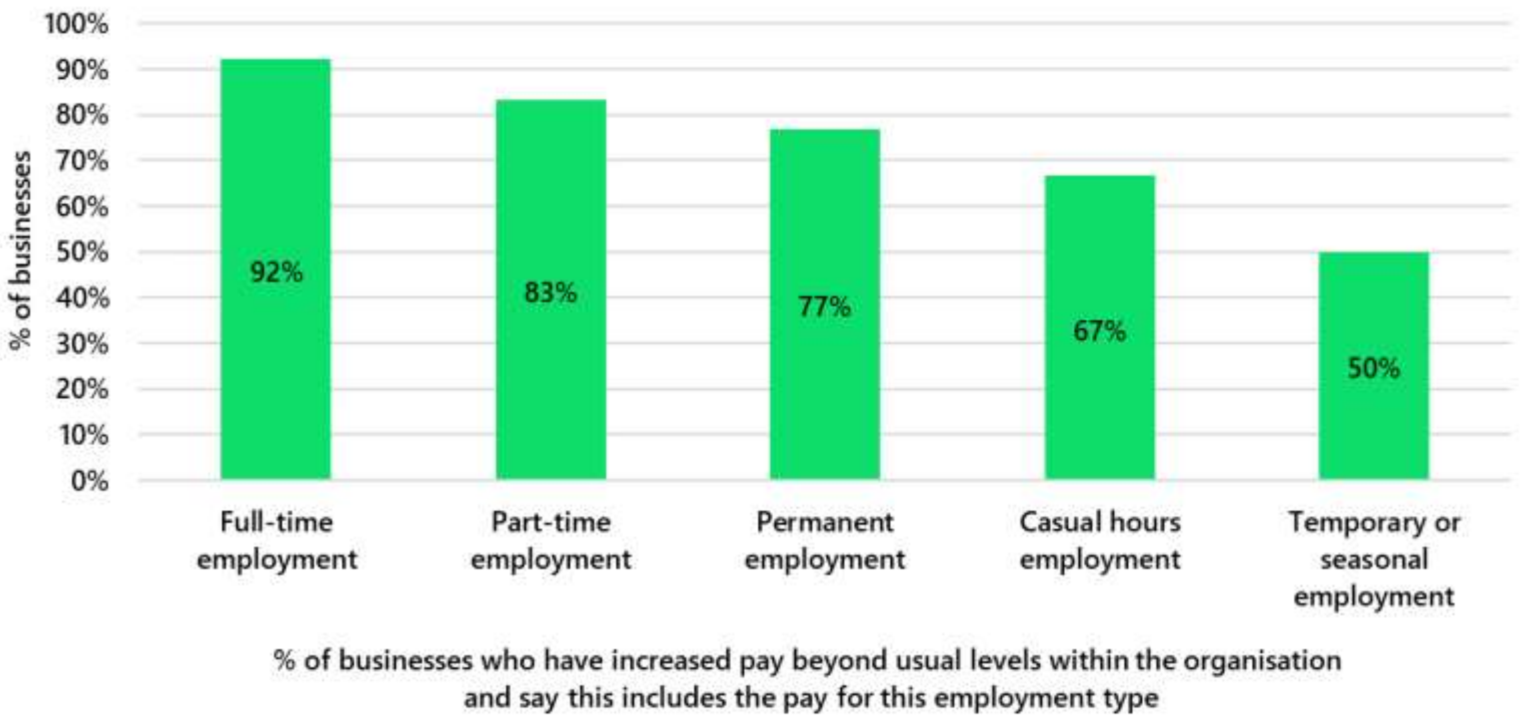
Sector pay – at role level



Q Since the sector re-opened earlier this year, has your business done any of the following to attract or retain staff? Multiple response available.
Increased staff pay for roles at entry level over and above what you would usually do? | increased staff pay for roles at supervisory/team leader level over and above what you would usually do? | increased staff pay for roles at management level over and above what you would usually do? | None of the above.
n=15 businesses.

Sector pay – by employment type

NatWest Group



Q You have indicated that the business has increased staff pay, above what the business would usually do, to attract and retain staff? Please let us know which of the following types of employment this has occurred within part-time employment | full-time employment | casual hours employment | temporary or seasonal employment | permanent employment. From options: Usual level of pay increase only | notably higher pay increases made to attract or retain staff | no employment contracts of this type within the business. Sample with roles in the business for the employment type stated: full-time: 13 | part-time: 12 | permanent: 13 | casual hours: 12 | temporary/seasonal: 6. Out of a possible thirteen businesses that reported that there had been staff pay increases over and above usual levels within their organisation and proceeded to answer this question.

Trend in forward bookings

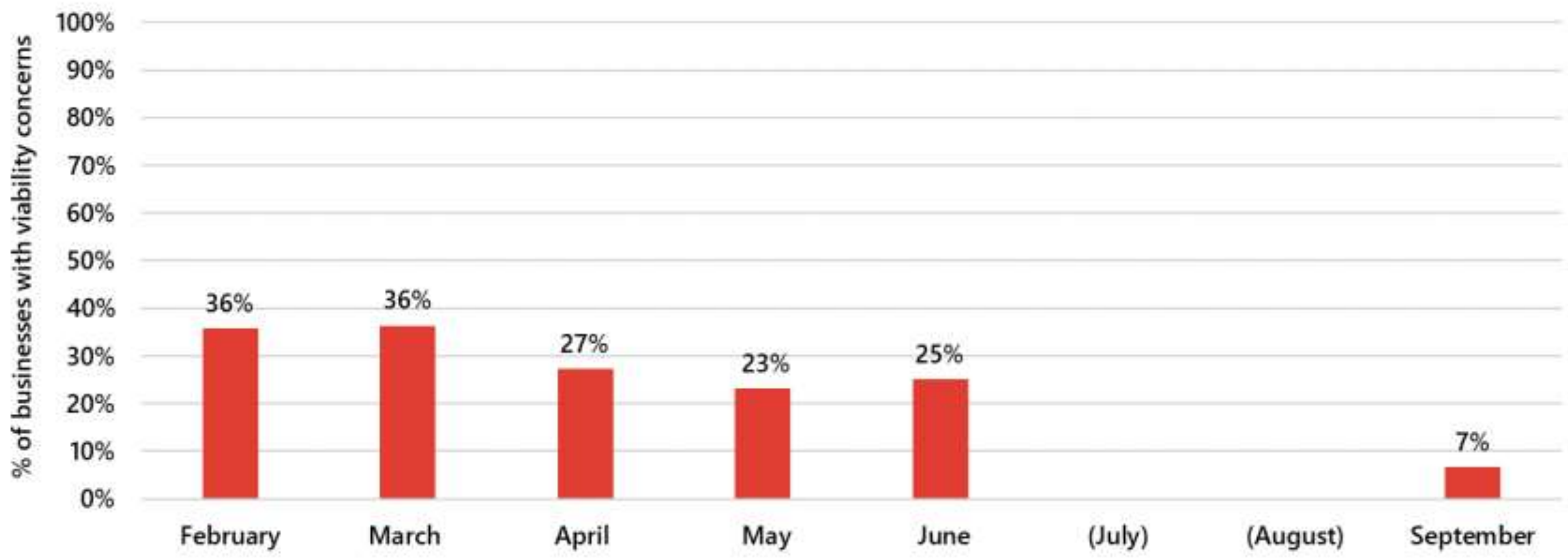
Q How do your overall advanced bookings for July-September 2021 compare with the same period in 2019, pre-pandemic? If you are not currently planning to be open at all during the quarter, please select the final option. Single response.
Q. How do your overall advanced bookings for October-December 2021 compare with the same period in 2019, pre-pandemic? If you are not currently planning to be open at all during the quarter, please select the final option. Single response.
Early June 2021 wave: n=9 businesses. Excluding three businesses unable to provide a comparison.
Early Sept 2021 final wave: n=12 businesses. Excluding three businesses unable to provide a comparison.

Forward bookings for the rest of 2021

NatWest Group

Q How do your overall advanced bookings look for September, compared with September 2019, pre-pandemic? Single response.
Q How do your overall advanced bookings for October-December 2021 compare with the same period in 2019, pre-pandemic? If you are not currently planning to be open at all during the quarter, please select the final option. Single response.
Over 75% down | 60-74% down | 45-59% down | 30-44% down | 15-29% down | 10-14% down | 5-9% down | less than 5% down | about the same | above 2019 levels | we were not open at this point in 2019 so do not have a comparison | We were open but are unable to provide a comparison.
n=12 businesses. Excluding three businesses unable to give a comparison.

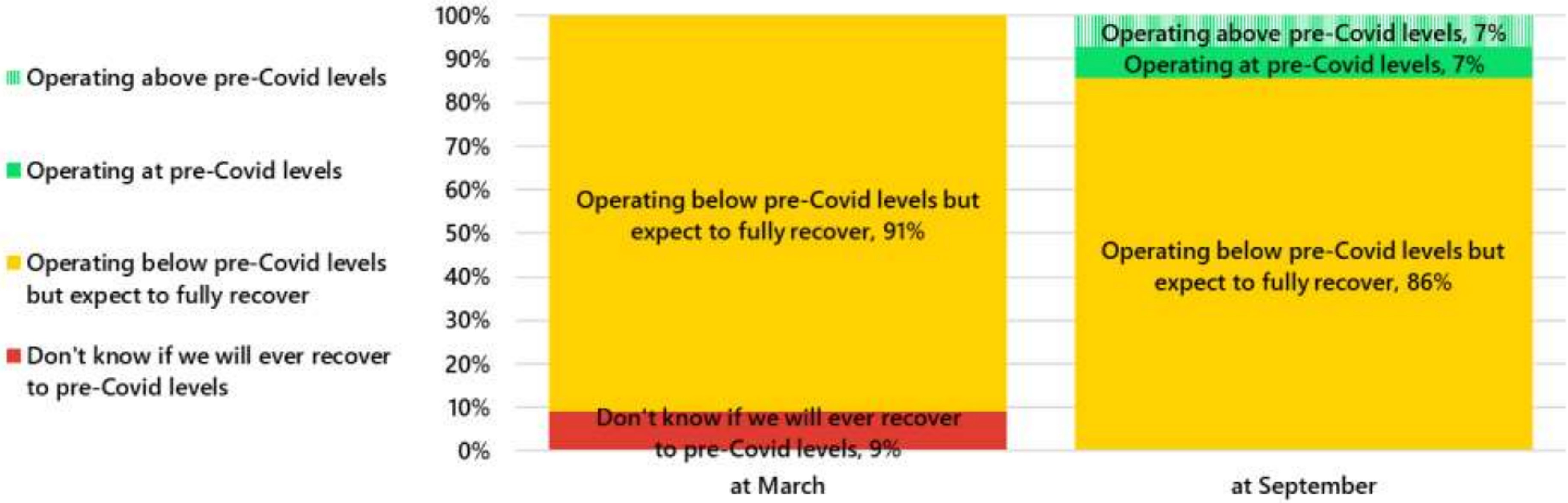
Concerns about future business viability



Q Do you have concerns about your business's future viability? Single response. Yes/No.
Samples: Feb 2021 (pre-roadmap and budget): 14 | Mar 2021 (post-roadmap and budget): 11 | Apr 2021: 11 | May 2021: 13 | June 2021: 12 | Sept 2021: 15.
The one business in September (7% of the sample) that reported to have concerns about the viability of their business gave feedback of 'If we fall back into lockdown'.

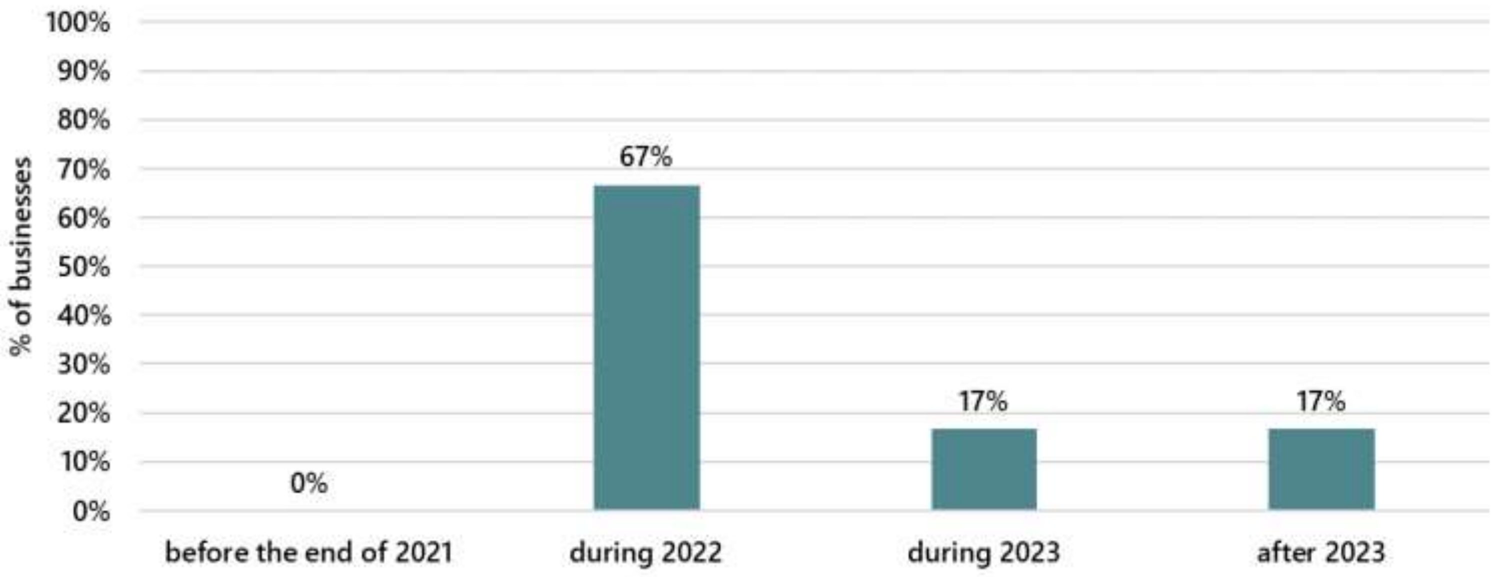
Financial position

NatWest Group



Q When do you currently anticipate that your business will be back to operating financially at pre-Covid levels? Single response.
Early Mar 2021 wave: n=11 businesses.
Early Sept 2021 final wave: n=14 businesses. Excluding one business that was a new business unable to give a comparison.

Financial outlook



Q When do you currently anticipate that your business will be back to operating financially at pre-Covid levels? Single response.
Early Sept 2021 final wave: n=the twelve businesses selecting that they are operating below pre-Covid levels but expect to fully recover.

Biggest concern for the next six months

NatWest Group

- “Another lockdown.”
- “Another lockdown, after the bank holiday weekend, will see how cases are impacted.”
- “Establishing realistic business performance. Aware that current business levels are not 'normal' and trying to establish true figures moving forwards.”
- “Housekeeping & Food and Beverage entry level recruitment... enabling us to grow within. There are wider availability of talent issues at supervisory or above level but as we have strong training and development programmes we are confident that when we get the right people in we can upskill.”
- “Potential of future lockdowns and inconsistent messaging. Consistency of travellers as international borders re-open. Lack of business travel.”
- “Recruitment and retention.”
- “Recruitment and wage costs.”

Page 1 of 2 – more comments on the following page…

Q What is the biggest concern for your business over the next six months? Verbatim response.
n=15 businesses (seven comments shown on this page and eight comments shown on the following page).

Biggest concern for the next six months

NatWest Group

- “Remaining open and rebuilding audiences and ensuring financial stability.”
- “Resourcing”.
- “[Staff] Retention”.
- “Return of Covid infections affecting public confidence”.
- “Staffing and confidence returning within the corporate fraternity”.
- “Staffing housekeeping and linen”.
- “Supply of goods and people – food/beverage/staffing”.
- “Workforce availability and quality”.

Page 2 of 2 – more comments on the previous page.

Q What is the biggest concern for your business over the next six months? Verbatim response.
n=15 businesses (eight comments shown on this page and seven comments shown on the previous page).

DMO support to businesses

NatWest Group

- “By promoting Manchester as a destination of choice for leisure, corporate and meetings business. Domestic locations are going to become very competitive therefore Manchester needs strong marketing and awareness campaigns.”
- “Continue to drive future events and encourage events to the city.”
- “Continue to promote return to destinations.”
- “Convert large conventions.”
- “Educating the population on the positives when working in hospitality.”
- “Ensure Manchester is the number one destination for both corporate and city break alike.   Improve the city’s 'welcome' and not just for corporate events.”
- “Fill the funnel and promote Manchester as a destination in all demographics.”

Page 1 of 2 – more comments on the following page…

Q How can your Destination Management Organisation/tourist board best support your business over the next six months? Verbatim response.
n=14 businesses. Excluding one business that didn’t provide a response (seven comments shown on this page and seven comments shown on the following page).

DMO support to businesses

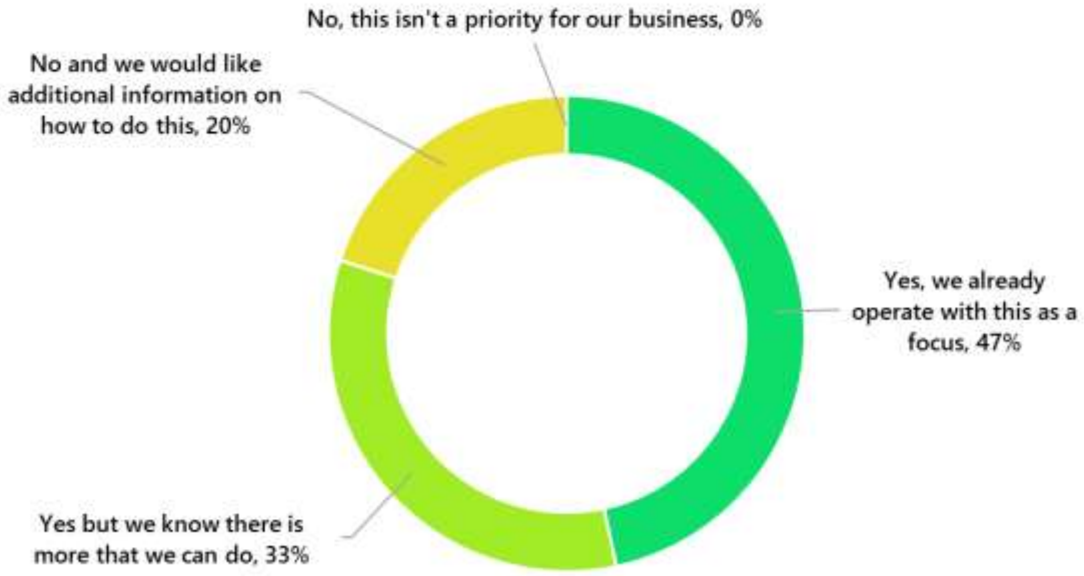
- “Focus on bringing back the conference and city events.”
- “Keep driving tourism into the city and continue the positive promotion of us being 'open and ready’”.
- “Keep promoting the city as the top choice for business and leisure travel and also investment”.
- “Lobby the government to relax ‘Brexit’ laws on foreign staff”.
- “National and international marketing campaigns”.
- “Sector intelligence”.
- “Sharing intelligence”.

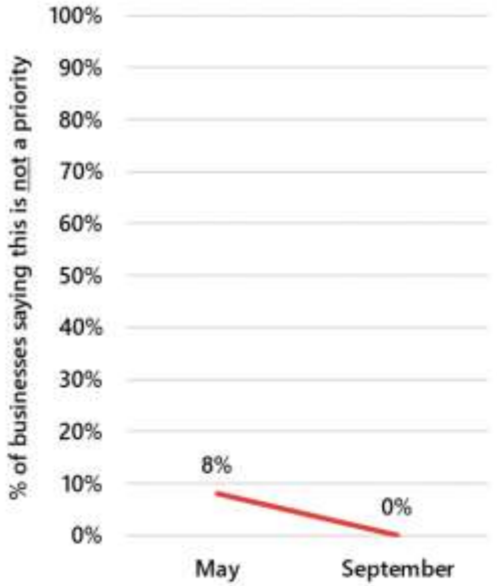
Page 2 of 2 – more comments on the previous page.

Q How can your Destination Management Organisation/tourist board best support your business over the next six months? Verbatim response.
n=14 businesses. Excluding one business that didn’t provide a response (seven comments shown on this page and seven comments shown on the previous page).

Going greener

NatWest Group





Q Are you planning to implement new ways for your business to be greener/more sustainable? Single response. Yes and we have found this easy to do | yes but we would like additional support | No as we don't know what we should be doing | no as this isn't a priority.
Q In the run up to COP26, more businesses are looking at their sustainability credentials. Do you feel that you have the information and support you need to become a more sustainable business? Single response. Yes the business already operates with this as a focus | yes but I know there is more we can do | no and we would like additional information on how to do this | no this isn't a priority for the business.
The final consistent option of 'No this isn't a priority for the business' has been used to provide an indication on shifts in general sentiment May to September.
Early May 2021 wave n=13 businesses. Early September 2021 wave n=15 businesses.

For more information on the NatWest North of England Tourism Business Barometer please contact:

Nick Brooks-Sykes
Director of Tourism
Marketing Manchester
nick.brooks-sykes@marketingmanchester.com

Jo Cuff
Tourism Analyst
Marketing Manchester
joanne.cuff@marketingmanchester.com