



Visit**Aberdeenshire**

industry.visitabdn.com

Lockdown Impacts Survey: Key Findings

January 2021



Survey Background

- On 5th January, mainland Scotland moved from Level 4 to a temporary Lockdown, running until at least the end of January*
- In response, VA issued a survey to businesses in the region
- Survey focused on:
 - the impacts of current Lockdown: cancelled business and further impacts beyond cancelled business
 - the impacts of cancelled bookings from February to Easter 2021
 - optimism levels short and longer term
- Research period: 11th – 15th January 2021
- Overall Sample = 145 (8% response rate)

*at time of survey, Lockdown period was 5th to 31st January.
Questions, and responses, were framed in this context

Key Findings (1)



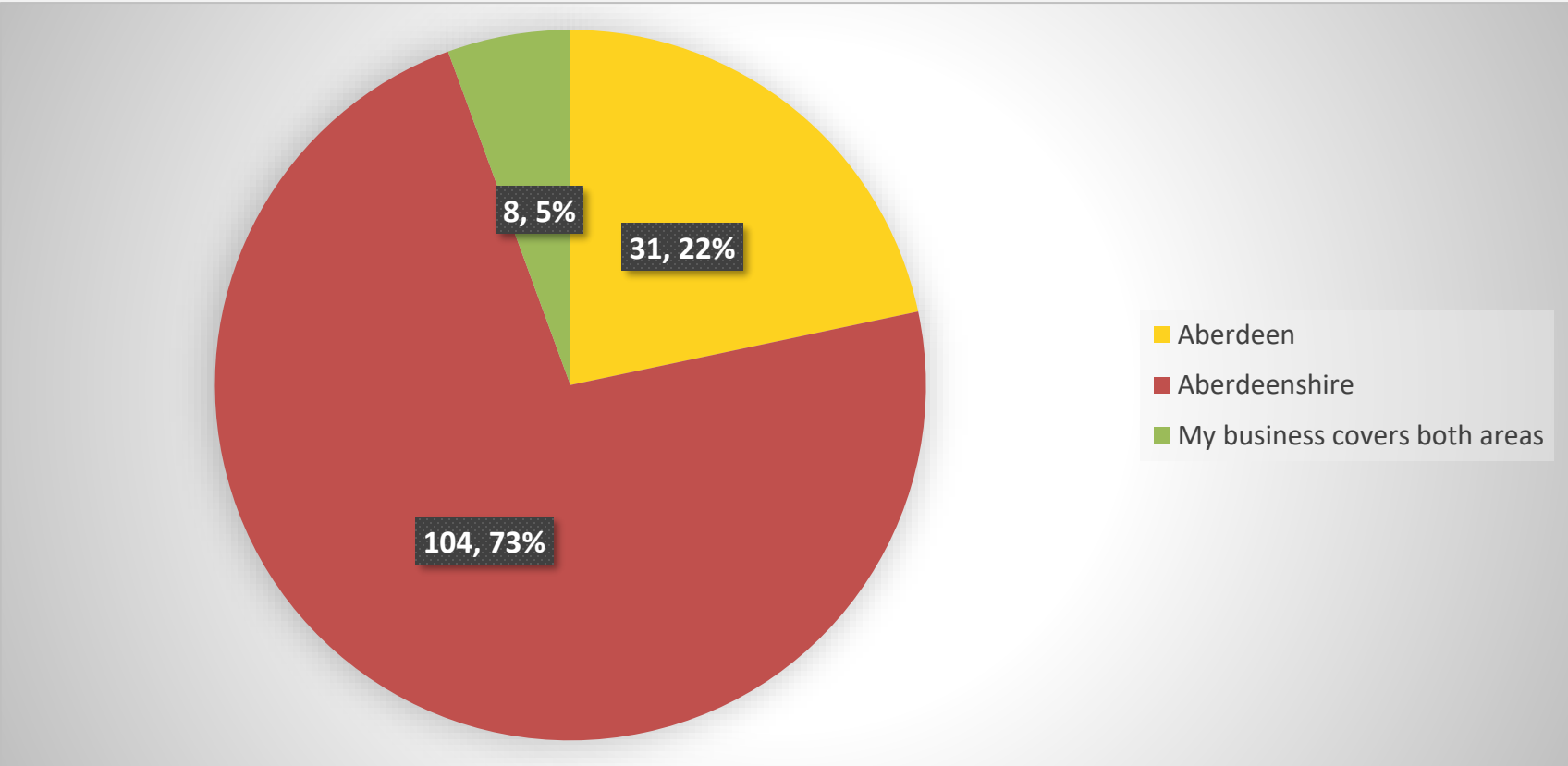
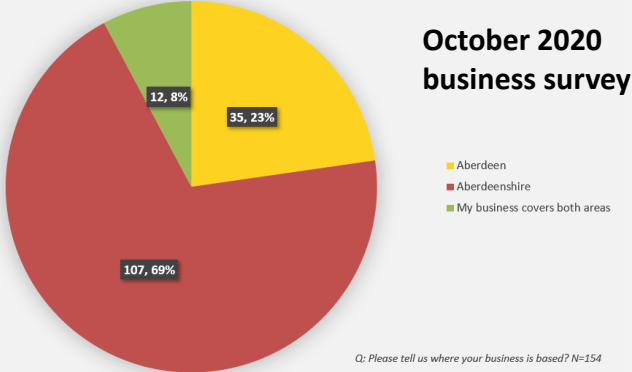
- Over 7 in 10 responding businesses were located in Aberdeenshire
- Top responding sectors: self-catering (27% of sample) and hotels (22% of sample), mirroring October business survey
- Just over 7 in 10 businesses stated that they have had to cancel business due to the current Lockdown
- For the **current Lockdown period** the cancelled business was valued at £1.78 million (based on details from 75 businesses)
- Businesses are experiencing many other impacts at this time: “temporary closure for the Lockdown period” and “furlough staff” were those selected most frequently by the sample, at 70% and 50% respectively
- Just over half the sample (54%) stated they have received cancellations for the period 1st February to 19th April
- Cancellations received for **1st February to 19th April** were valued at £782,096 (based on details from 43 businesses)

Key Findings (2)

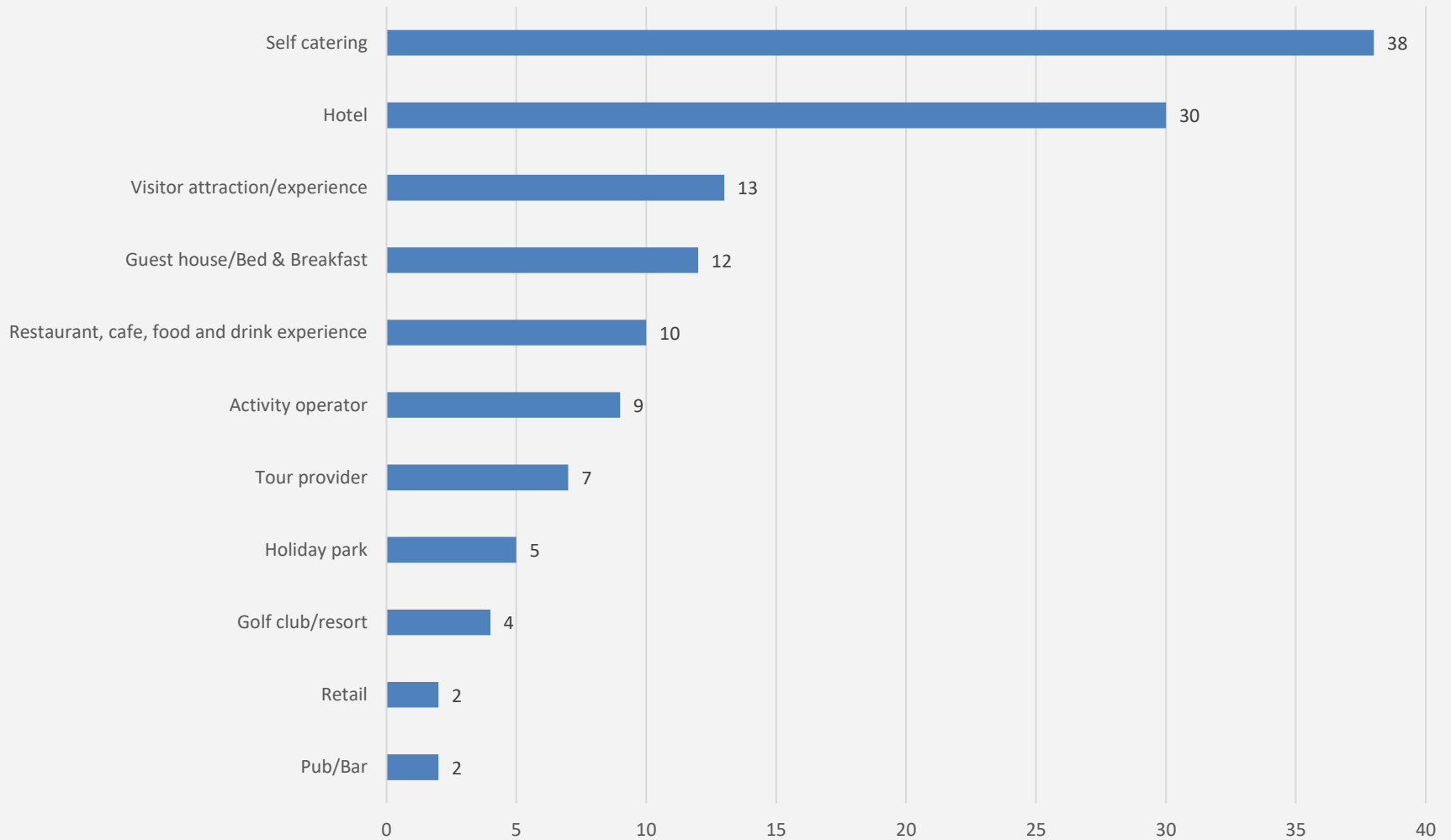


- We questioned respondents on their optimism for the next 3 months, and also for the next 12 months:
 - Unsurprisingly, the majority (84%) are not very/not at all optimistic regarding the next 3 months
 - This drops to 52% when the respondents considered the next 12 months
- The final, open-ended, question prompted many responses, the most dominant themes were:
 - Criticism of financial support (lack of funding and timing)
 - Business survival/closure
 - The “invisible loss” associated with the lack of new bookings being made

Where were responding businesses located?

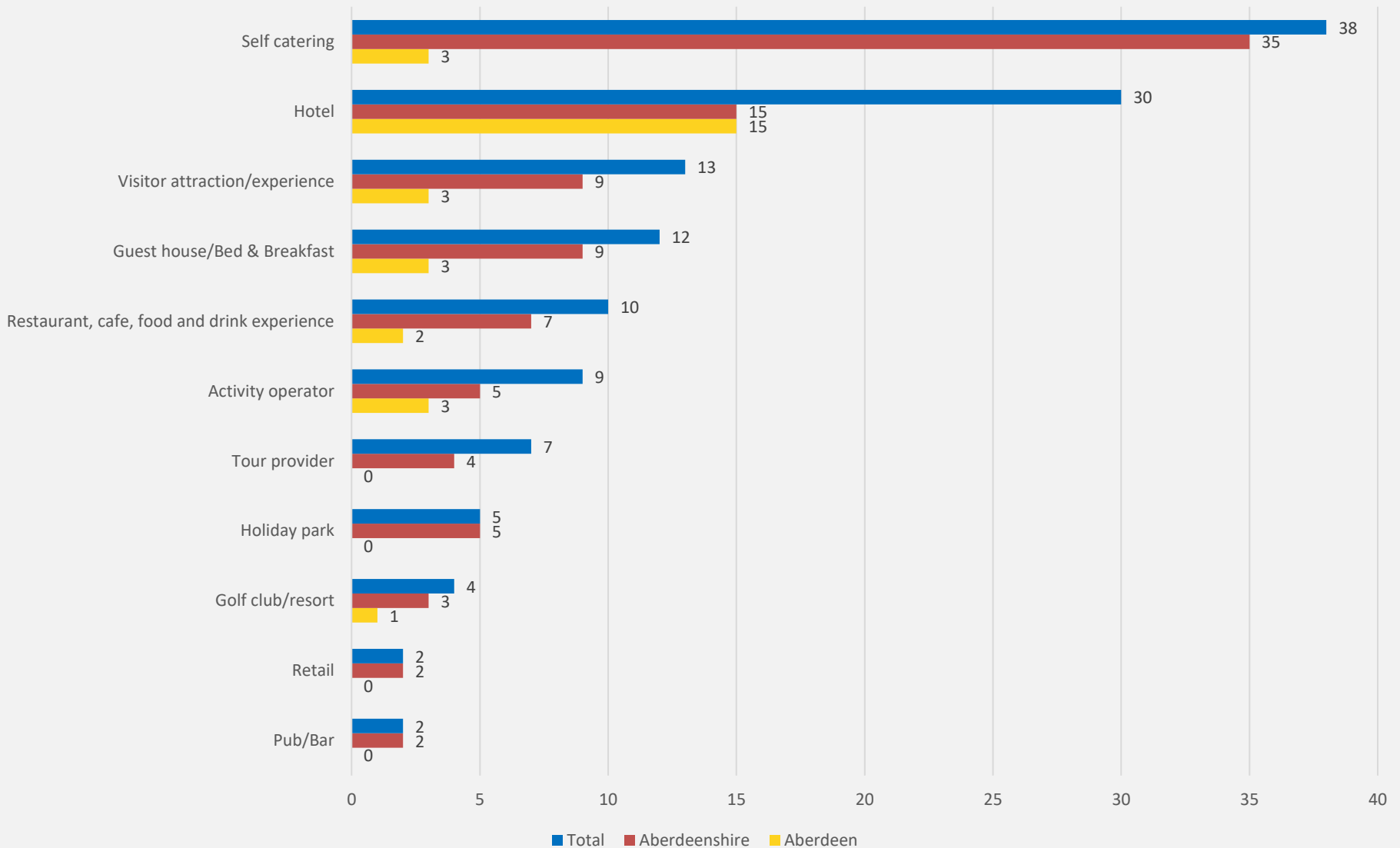


And which sectors did they represent?

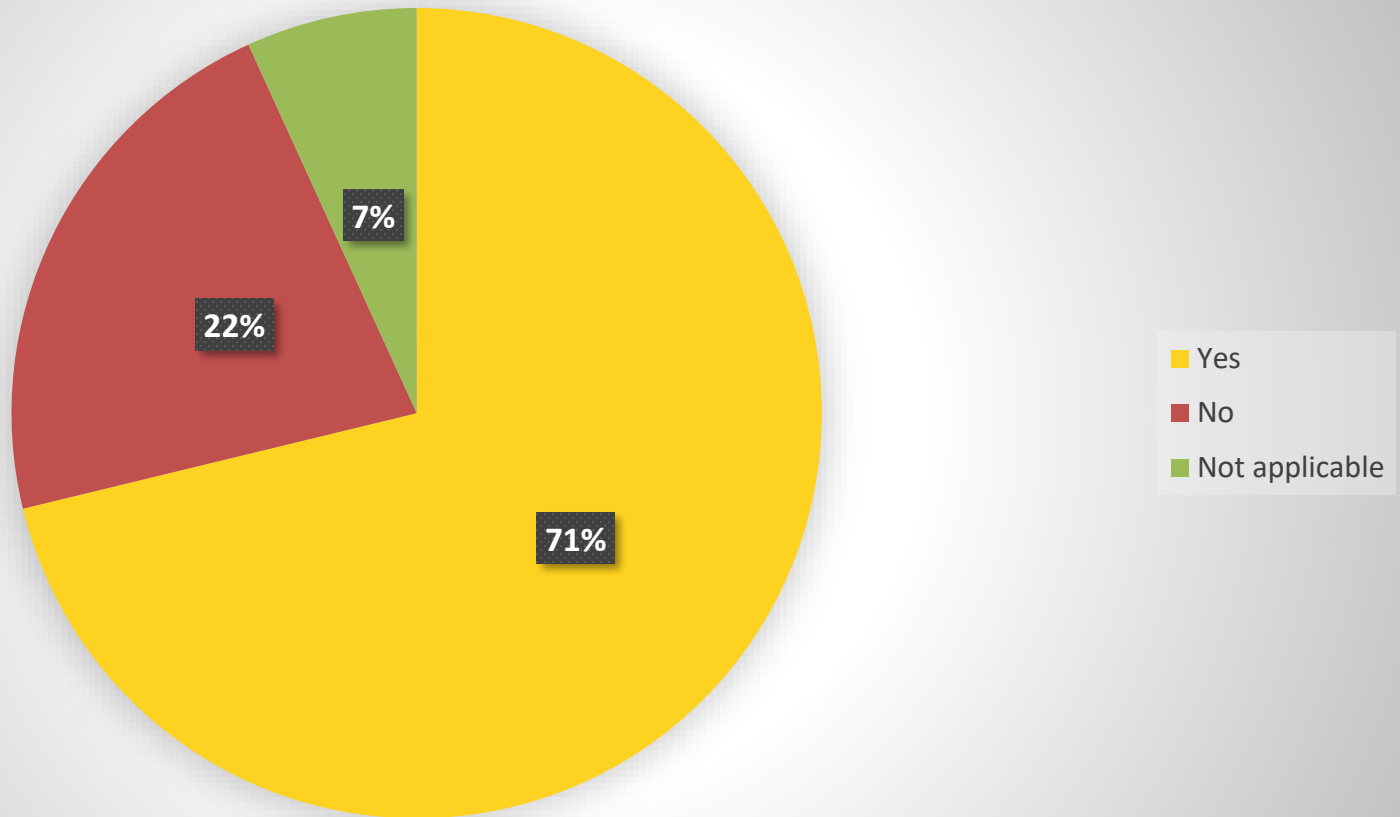


Base Sample: 139

Industry sector by business location



Have you had to cancel business due to the current Lockdown? (5th January – 31st January)



Base Sample = 132

Current Lockdown: Value of Cancelled Business

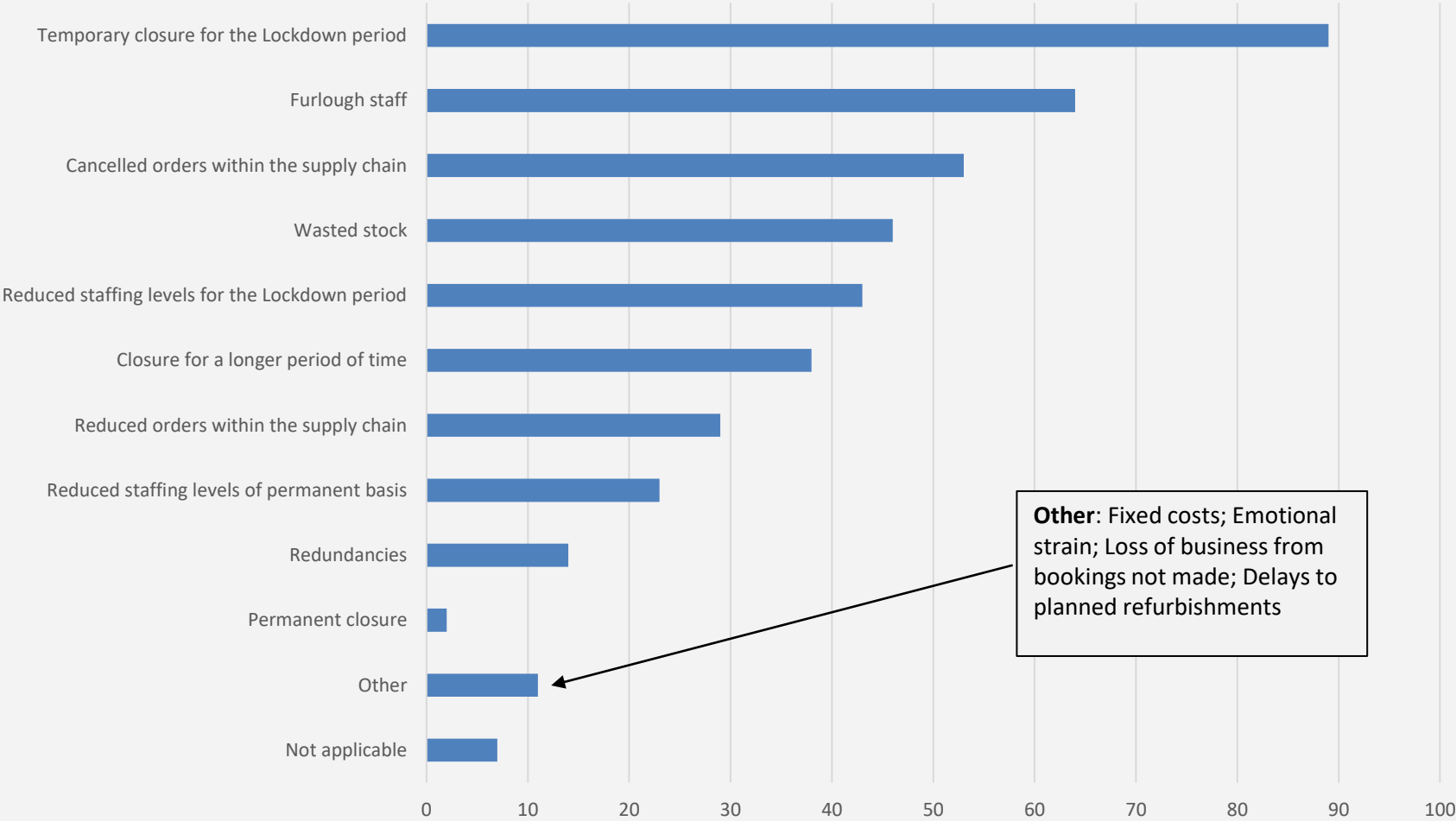


	Number of businesses providing details	Value of Cancellations
Accommodation	51	£1,267,297
Non-Accommodation*	24	£508,000
TOTAL	75	£1,775,297

- 75 businesses provided cancellation details, stating that for the *current Lockdown period* the cancelled business was valued at £1.78 million.
- Impossible to capture full value, several respondents stating:
 - they could not put a figure on their lost business
 - bookings were unusually low in comparison with previous years, this is not captured within the figures above

*Non-Accommodation: restaurant, café, food and drink experience; visitor attraction/experience; tour providers; public house; activity operator; golf club/resort; vehicle rental

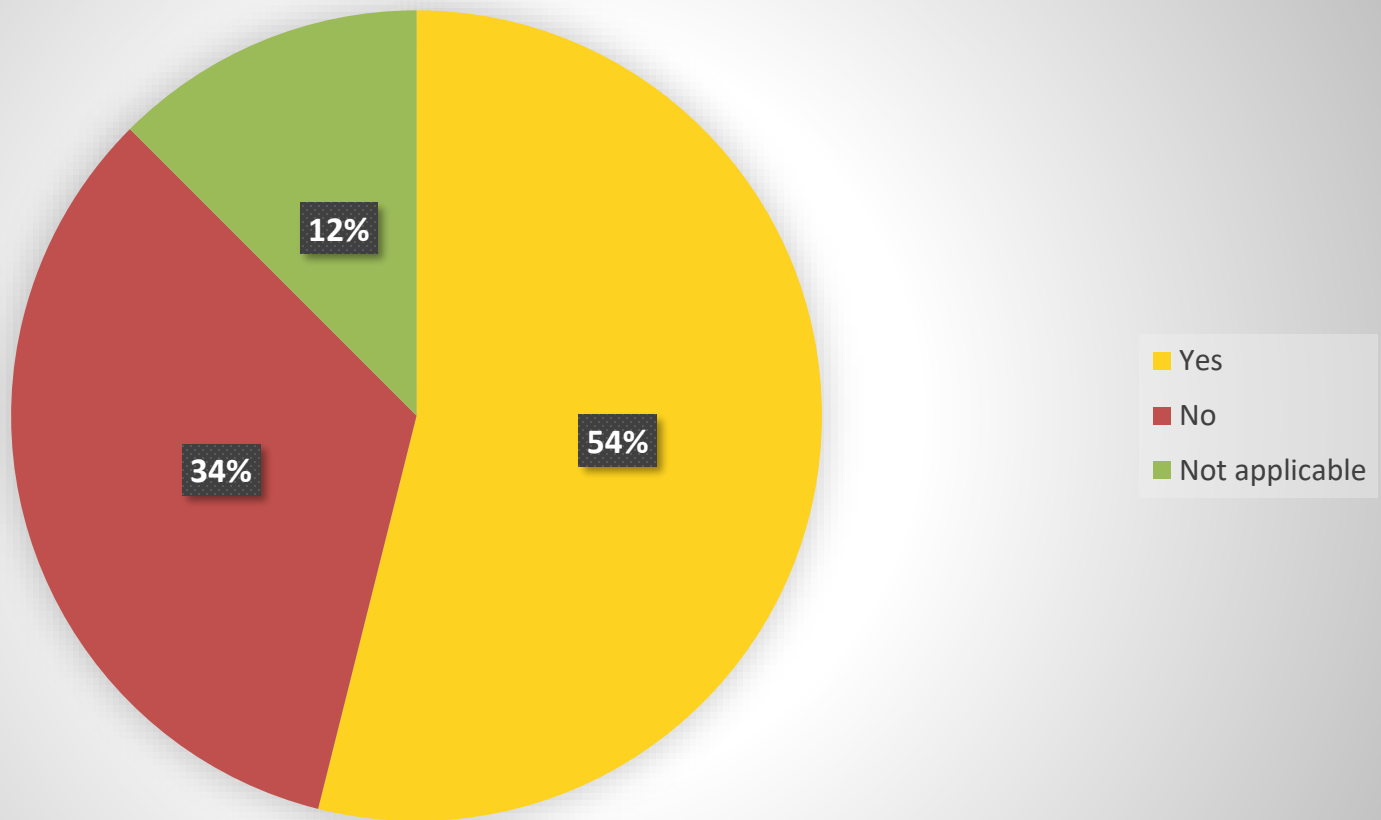
Further impacts as a result of the current Lockdown?



Other: Fixed costs; Emotional strain; Loss of business from bookings not made; Delays to planned refurbishments

Base Sample = 128

Have you received any cancellations for the period 1st February to 19th April?



Base Sample = 128

1st February – 19th April: Value of Cancelled Business



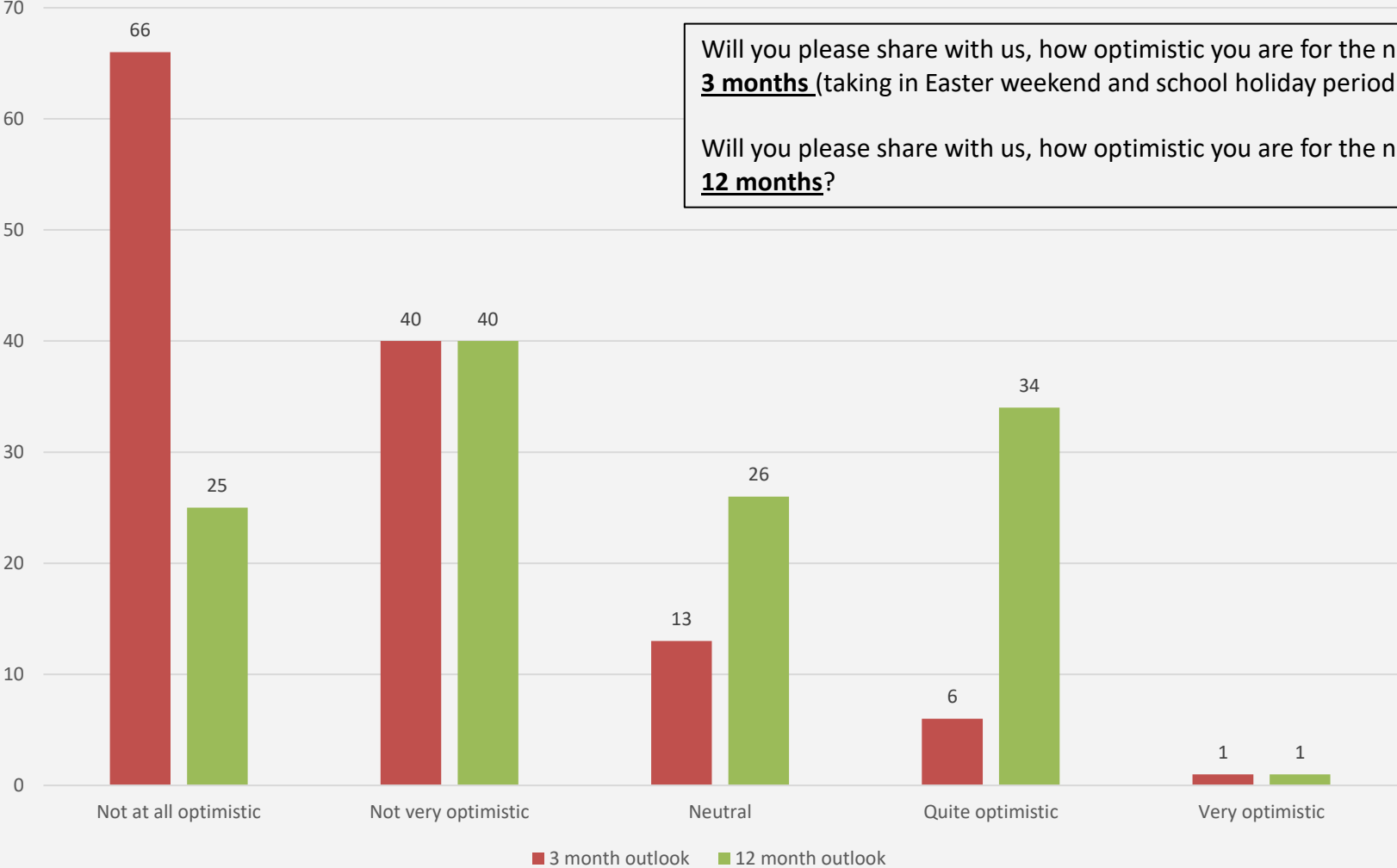
- In the previous question, 69 businesses (54%) stated they had experienced cancellations for the period 1st February to 19th April.
- Of those 69 businesses, 43 were able to put a value on those cancellations

	Number of businesses providing details	Value of Cancellations
Accommodation	32	£539,846
Non-Accommodation*	11	£242,250
TOTAL	43	£782,096

- Not the full picture:
 - Several respondents couldn't put a figure on their lost business
 - Traditional number of bookings haven't been received in first place

*Non-Accommodation: restaurant, café, food and drink experience; visitor attraction/experience; tour providers; public house; activity operator; golf club/resort; vehicle rental

Optimism Levels



Base Sample = 126

Any final comments?



Dominant Themes

- Criticism of funding support: lack of funding and timing
- The “invisible loss” from bookings not made in the first place:
 - significantly down when compared with previous years
- Business survival/closure
- Lack of clarity: Lockdown timings and pathway to recovery
- Impact on the economy and businesses not being managed by Scottish Government
- Booking patterns have altered:
 - Advanced bookings almost non-existent:
 - Customers leaving it to the last minute when they will have greater certainty

Any final comments?



The uncertainty of the pandemic and the worry of these other variants of the virus from abroad. Lack of realistic financial support if things are no better by summer, I will be forced to close the doors permanently! Loss of vital facility for the rural community and 18 people losing their jobs and my own personal financial position will cause its own issues

Aberdeenshire hotel

Aberdeenshire self-catering

Rural tourism should hopefully pick up in the summer . The cities have been and will continue to be a disaster zone

Aberdeen self-catering

For 2021 we have no forward bookings. Strictly speaking our business is financially bankrupt. We can only keep it going by using 100% of my pensions to pay the overhead bills like Community Tax, etc. plus funds from past savings

We are a visitor attraction so do not expect many visitors at the moment but this is usual for this time of year. We will notice it more if there are still restrictions in April

Aberdeenshire visitor attraction



Visit**Aberdeenshire**

industry.visitabdn.com

Deirdre O'Donnell

Insights & Evaluation Manager

deirdre.odonnell@visitabdn.com

