



# Restoration and Recovery, Key Considerations Arising from the Impact of the Coronavirus on Businesses in East Lindsey District

### EXECUTIVE SUMMARY

East Lindsey District Council commissioned a short and sharp survey of the business community to identify how it had been affected by the coronavirus. 44 businesses were interviewed during the week 27 April – 1 May 2020.

A recent Royal Society of Arts report identifies 14,280 staff – **34% of the workforce on furlough in East Lindsey**. Data from the Office for National Statistics on the economic profile of East Lindsey has been used to identify the number of employees referenced in the sections below.

**Tourism/Hospitality** - There are 7,500 people in the District employed in Accommodation and Food Services around 90% of whom are on furlough. Up to 3000 jobs in the wider supply chain are at threat. The implications of social distancing in the longer term could reduce the operational capacity of tourism and hospitality businesses by 50%. Most businesses are not expecting to employ seasonal staff this could impact on 3,000 people and their wider families.

**Retail and Food** producers focused on catering - are similarly affected with at least 2000 jobs at risk.

**Manufacturing and Employment Businesses** – have seen a 30-40% reduction in business activity – putting 1800 jobs at risk.

**Business in Other Sectors** – report a downturn of up to 50% in business.

The impact of coronavirus is particularly pronounced on the coast.

**Wider issues identified are:**

- There is very widespread dependence on furloughing 39 of our 44 respondents were using it or aspire to.
- The business rates grant has been welcomed by those receiving it and has supported them particularly in managing their cashflow.
- The furlough scheme is not sufficiently long in duration to enable tourism businesses to see out their financial challenges across the whole year. It does not take account of seasonal fluctuations to earnings.
- Many businesses have no plan for how to proceed once the support from the Coronavirus Act 2020 comes to an end.
- Businesses have not been significantly affected by supply chain or workforce availability issues.
- There has been a relatively smooth transition to home working but it has revealed the limitations of broadband and mobile networks.

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- Family businesses, which are a significant feature of the business landscape in East Lindsey, are in some cases more robust because of their deeply embedded financial and supply chain relationships.
- Almost all businesses anticipate a process of significant business closures and rising unemployment in the second half of the calendar year.
- Businesses are anxious about the challenge of responding to the lifting of lockdown and would value support on how to plan their way through this challenge.

The findings from this survey are consistent with the recent Visit Lincoln Tourism Survey and the East Lindsey District Council Strategic Recovery Plan Paper.

Businesses have a clear set of Asks to help them navigate their challenges:

Short-term issues include:

- **Business grants**– this involves help with business disruption, providing enough resource, to complement the funding from the national schemes of business support, for smaller tourism and hospitality operators to get through to the end of the season and become sustainable for next year.
- **Rates holidays or deferrals**– this would operate on the basis of an identical rationale to the business grants above.
- **Free car parking**, to boost business, once the lock down is lifted, by attracting customers to the District's towns.
- **A council "buy local" programme**. This would involve the council sourcing more of the goods and materials it uses from East Lindsey businesses.
- **More intensive engagement with key businesses**. Around a third of respondents felt a regular pro-active approach to check their status and needs would be a very useful means of maximising the support East Lindsey District Council could give to them.

Long Term issues opportunities:

- **Promotion of East Lindsey as a "safe" place to visit or live as a means of attracting future investment**. Several of the respondents felt that this should be the theme of a new place marketing campaign.
- **Space to grow**. A view from a number of respondents, that with the right investment package the district could be an attractive location for business to relocate to, and that now is the time to plan to deliver more employment space, ideally at scale.
- **Buy Local**. It was proposed that the council could develop a matching service linking local suppliers and consumers of services, it could also run meet the buyer events to bring businesses together.
- **A National Campaign**. Respondents identified that the grave nature of the specific impact on tourism businesses means the district should be using its influence to lobby Government on the provision of a specific package of national support. Measures suggested included:

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- increasing the duration of the furlough scheme for hospitality, tourism and retail businesses in coastal areas,
  - resourcing a coastal grant scheme with a focus as set out in the short term measures referenced above,
  - exploring the potential for the development of tourism enterprise zones and the extension of freeport status to tourism locations,
- ***Local lock down lifting plans, specific to key places such as Skegness and Mablethorpe.*** This would involve establishing place based, business led regeneration partnerships, which could work with the council to:
- unlock development sites,
  - stimulate investment in vacant premises,
  - facilitate start up enterprise amongst local people
  - bring businesses together to identify the scope for enhanced local trading.
  - and supporting the implementation of local development orders to simplify and speed up the planning process,
  - The plan would also involve considering how the phased lifting of the lockdown could best be managed to help with issues such as reopening of adapted restaurants and pubs and reintroducing tourists taking account of the ongoing challenges of social distancing.

The council has some capacity to respond to all this issues, in many cases in wider partnership with others and a suggested list of actions is set out at the end of this report.



# INTRODUCTION

A very recent Centre for Towns report identifies both Mablethorpe and Skegness as amongst the top 10 towns most impacted by covid-19. This is because of the high number of businesses in the area, which have had to close/scale down. Many of these are tourism, hospitality and food wholesale businesses. The Royal Society of Arts has looked at the proportion of workforce on furlough. The national average is 25%. ***The figure (the second highest in the country) for East Lindsey is 34%.***

In response to these studies and local intelligence East Lindsey District Council commissioned a fast moving survey of the business community to identify how it had been affected by the coronavirus. 44 businesses were interviewed during the week 27 April – 1 May 2020.

A list of the businesses interviewed is set out at the end of the report. The findings from the survey are set out below:

## Reported Impacts By Business Sector in East Lindsey

### ***Tourism/Leisure***

It is very clear that tourism and leisure businesses have been most affected by the pandemic. They are all defacto closed. The seasonal nature of tourism in East Lindsey means that businesses in this sector have effectively written off the whole season. ***Those responding to the survey identified they were running at no more than 10% of their usual staffing arrangements.***

Whilst Government measures such as furloughing and the business rate grant have provided some support (most respondents in this sector reported receiving this) none of the businesses we talked to anticipate that this will enable them to survive the whole season in good shape. ***There are 7,500 people in the District employed in Accommodation and Food Services (Business Register and Employment Survey 2018) around 90% of whom are on furlough.***

The income these businesses are likely to lose will effectively remove a whole year's funding because if the lockdown is lifted during the ***off season they do not earn much during this period. Government support is planned to last for around 3 months, leaving a funding gap for some businesses of 9 months.*** Some businesses would like the council to relax planning controls on the length of the season to help them extend their earning opportunities.

The furlough scheme is based on average earnings over a year and therefore for seasonal tourism businesses effectively offers ***only half the support it does for people who earn the same wages during the whole year.***

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In addition to furloughing staff, tourism businesses are not planning to recruit their seasonal workers. This will have a major impact on low skilled individuals and families on the coast. ***Our informants indicate that this could equate to around 40% of their workforce, looking at the number of people employed in tourism and hospitality related sectors in East Lindsey this could equate to up to 3,000 jobs.***

Respondents indicated that social distancing, which is likely to be an ongoing challenge post lockdown will significantly affect their earning potential by reducing the scale and capacity of their premises. ***A rounded overview of responses indicates that overall capacity will be reduced by at least 50%. This could mean that around 4000 workers in this sector would be surplus to requirements.***

The impact will not be restricted to the tourism/leisure businesses themselves, wider supply chain links downstream from these businesses, in terms of contractors and local suppliers will be very badly affected. On the basis that one tourism job supports a third of a job in the wider economy (source Scottish Government Input/Output tables) ***this could equate to a further 2,500 jobs.***

### ***Food Businesses***

There is a significant difference between those food producers who are focused on catering and those focused on retail. The former group has been almost as badly affected as tourism businesses. ***Respondents indicated that they had at up to 90% of their workforce on furlough***, due to the closure of the majority of outlets for their produce. Those supplying food retailers have seen if anything a spike in demand.

### ***Retail Businesses***

Retail has been significantly affected and shopping centres and retailers report impacts, which are almost as challenging as for tourism businesses. The vast majority of non-food shops are closed and reported between ***80 and 100% of staff on furlough. There are 5,000 retail jobs in East Lindsey and this therefore equates to at least 2,000 jobs assuming at least 50% of workers are in non food retail.***

### ***Manufacturing and Engineering***

Businesses in these sectors report impacts of ***20-40% business reduction, which is broadly consistent with the RSA view that 34% of businesses in the district are at risk.*** There is little evidence that supply chains have significantly affected the operation of businesses in these sectors. Most respondents have enough capacity to run for 3-6 months in the current economic circumstances. There is some disquiet that if the lockdown is not effectively ameliorated within the next six months, their situation will become significantly challenged. ***There are 4,500 jobs in this sector in the district and assuming this business downturn translates into jobs up to 1800 jobs are at risk.***

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### **Other Respondents**

A range of other types businesses in the area, which we interviewed, appear significantly challenged. In most cases they have lost at least 50% of their customer demand. A fair proportion of these are family businesses. These businesses report having the long term capacity and networks to ride out the current difficulties for perhaps a further quarter without major disruption. Their longevity also helps them flex long term customer and supply chain relationships based on trust and locality to help them with issues such as credit and the supply of services.

***In summary there are 42,000 jobs in the district and a 34% furlough rate equates to 14,280 jobs. The biggest impacts are in tourism/hospitality, and non-food retail where around 90% of staff are on furlough.***

### **Broader Perspective**

Short term Government support is crucial in helping businesses to survive. ***34 of the 44 businesses we interviewed were using the furlough scheme a further 5 weren't eligible but would have used it if they could.***

There is a clear distinction between those businesses in the seasonal tourism economy and the rest of the businesses in the district. The impact on the coast as a consequence of its dependency on the most heavily affected business sectors is likely to be exceptional. Inland the impact is grave but with more diverse economies less severe in relative terms.

By way of some examples of the above point, a number of manufacturing businesses in the Louth area and agri-food businesses more widely in inland settings provide a buffer against the massive impacts on the non-food retail and tourism businesses. ***One manufacturing business indicated it could manage for up to a further 6 months in the current climate without significantly negative impacts. A second respondent indicated that within 6-9 months they expected to return to a full order book. A third engineering company involved in exporting reported positive sales arising from the weak £ and lower energy costs.***

The relatively small number of Covid-19 cases in East Lindsey means that businesses have not been too significantly impacted by the workforce shielding or self-isolating. More widely an increased pattern of home working to support social distancing is anecdotally reducing the amount of time workers routinely report in sick. ***An engineering business and a large food production business both referenced good ongoing attendance rates from those who had been moved across to a process of remote working. Both businesses reported, as did a number of other respondents, that remote working was more productive than traditional working patterns.***

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Businesses report that they are finding customers, suppliers and intermediaries such as banks more helpful than they might have anticipated. There is significant recognition of the contribution the District Council has made in this connection through its distribution of business rate grants. **Over 10 respondents identified this support as very helpful in terms of cash flow.**

**At least four medium sized family businesses indicated that their business model of long term local trading and access to family investment resources underpinned their resilience in the current climate. All four indicated very long term strong relationships with local suppliers gave them confidence about their supply chain.**

### Businesses Analysis of the Situation

Many respondents feel that home working will become an increasing aspect of the way organisations operate in the future. They reflect that **for this to be effective in East Lindsey better mobile and broadband connectivity is desirable.**

Businesses have a clear impression that global trading may diminish and local trading may well be enhanced. In addition to experiencing some modest supply chain problems those businesses, which are coping best, reflect that in part at least this is because of their **local relationships and trading connections.**

There is a widely held view that there will be a significant market adjustment with more vulnerable businesses being forced to close. **Some more robust businesses report they have picked up additional demand from the customers of those businesses in their sector, which have had to effectively shut up shop. At least two food processing businesses raised this issue as part of their response to the survey, along with a number of the accountancy businesses offering a wider overview of the impact of the pandemic on their clients.**

There is a pessimistic view that the scale of the impact, particularly in relation to coastal strip will take a generation to recover from. **This was a theme raised by a number of tourism respondents but also interestingly featured strongly in the comments of all the accountancy businesses responding to the survey.**

There are concerns that if the lockdown is lifted too soon the economy could go from being in suspended animation to a dangerous short term spike which could make it very hard to service demand. There are also concerns that bringing significant numbers of people to the coast too soon could lead to the area being at the forefront of a second wave of the pandemic. **4 of the tourism and hospitality businesses raised this issue of the difficult balance between managing the lockdown and lifting it to enable recovery.**



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There is a broad recognition that the situation in East Lindsey is graver than the national picture largely because of seasonal tourism (**almost all of the 44 respondents discussed this**). We have set out above how the loss of the season has a whole year impact on businesses and this is a core theme, which businesses feel should in some way be reported to and recognised by Government. **Six respondents with patterns of seasonal working raised this as a real issue and suggested direct lobbying.**

There were some rays of optimism amongst businesses. There is a feeling that this major adjustment, will re-set the dial for all businesses. In this situation those that survive will have enhanced markets. Agile and fast moving businesses linked to sectors such as health, food retail and IT will all have new markets. It is interesting to note that the IT training businesses interviewed as part of this survey report a large increase in demand. **Interestingly the accountancy businesses interviewed all identified this as an issue/opportunity.**

### **Business Asks**

It is possible to split the requests for support by business into short term and long term issues.

Short-term issues include:

- **Business grants**– this involves help with business disruption, providing enough resource, to complement the funding from the national schemes of business support, for smaller tourism and hospitality operators to get through to the end of the season. There was also a request for similar support from business in their supply chain. Each grant application would need to be assessed on its merits, taking account of the likelihood that the proposed recipient would have the potential, with this support to survive and become sustainable.
- **Rates holidays or deferrals**– this would operate on the basis of an identical rationale to the business grants above. It may be a more efficient means of providing support as it doesn't involve direct financial payments and may therefore also be less onerous to manage and account for.
- **Free car parking**, to boost business, once the lock down is lifted, by attracting customers to the District's towns.
- **A council "buy local" programme**. This would involve the council revisiting its current procurement practices to examine the scope for it to source more of the goods and materials it uses from East Lindsey businesses.
- **More intensive engagement with key businesses**. Around a third of respondents felt a regular pro-active approach to check their status and needs would be a very useful means of maximising the support ELDC could give to them.

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Long Term issues opportunities:

- **Promotion of East Lindsey as a “safe” place to visit or live as a means of attracting future investment.** Several of the respondents (interestingly manufacturing and food businesses as well as retail and hospitality operators) felt that this should be the theme of a new place marketing campaign.
- **Space to grow.** A view from a number of respondents including two of the accountancy firms interviewed, that with the right investment package the district could be an attractive location for business to relocate to, and that now is the time to plan to **deliver more employment space, ideally at scale.**
- **Buy Local.** It was proposed that the council could develop a matching service linking local suppliers and consumers of services, it could also run meet the buyer events to bring businesses together.
- **A National Campaign.** Respondents identified that the grave nature of the specific impact on tourism businesses means the district should be using its influence to **lobby Government on the provision of a specific package of national support.** Measures suggested included:
  - increasing the duration of the furlough scheme for hospitality, tourism and retail businesses in coastal areas,
  - resourcing a coastal grant scheme with a focus as set out in the short term measures referenced above,
  - exploring the potential for the development of tourism enterprise zones and the extension of freeport status to tourism locations,
  - and supporting the implementation of local development orders to simplify and speed up the planning process.
- **Local lock down lifting plans, specific to key places such as Skegness and Mablethorpe would be really useful in helping give businesses the confidence to plan for recovery.** The benefit of local engagement in recovery planning is an opportunity referenced in the University of Newcastle plan (“Covid-19 and Rural Economies”, Centre for Rural Economy, University of Newcastle, April 2019). Many respondents agree with this. It would involve establishing place based, business led regeneration partnerships, which could work with the council to:
  - unlock development sites,
  - stimulate investment in vacant premises,
  - facilitate start up enterprise amongst local people
  - bring businesses together to identify the scope for enhanced local trading.
  - The plan would also involve considering how the phased lifting of the lockdown could best be managed to help with issues such as reopening of adapted restaurants and pubs and reintroducing tourists taking account of the ongoing challenges of social distancing.

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### The Council Response

There are two categories of activity the council could pursue:

#### ***Using its influence:***

Working in partnership the council should lobby Government, for a dedicated package of support. There will be more credence to this if the ask is broadened out to cover the coastal local authorities. Key themes should include:

- an enhanced furlough scheme, perhaps focused on a longer time scale to sustain seasonal tourism businesses,
- an adaptation of the business bounce back loan scheme to offer more generous terms, including deferral of any repayments for 2 years to give more scope for seasonal impacts of the recession to be overcome,
- exploring innovative opportunities within the planning system such as Coastal Freeport status and Tourism Enterprise zones,
- bringing forward the release of up to 10% of the current Towns Fund designation for Mablethorpe and Skegness to create a revenue based ***lifting the lockdown*** strategy for these towns, this could include delivering the survey respondents business asks set out above

It is clear that there will be wider social knock on effects outside of business and the Council should think about how it can interact with organisations such as the DWP to ensure the needs of the unemployed are effectively planned for.

A University of St Andrews report has predicted significantly higher levels of Covid-19 fatalities in rural locations due to larger ageing populations. Settlements such as Mablethorpe are particularly vulnerable in this context and contingency planning should a second wave of the pandemic arise should be a priority.

#### ***Direct Action***

The Council, taking account of the business asks above, could:

#### ***Short Term (by the end of June)***

- Relax planning controls on the length of the season.
- Meet a proportion of business rates liabilities for the worst affected businesses.

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- Develop a business loan or grant scheme using its own resources to complement national schemes of support, focused on supporting small businesses (with a turnover of up to £2 million) where a modest level of additional investment will enable survival and longer term sustainability.
- Redeploy some of the time of its economic development and tourism team to build personal account relationships with the area's most important businesses. This survey has indicated that there is significant enthusiasm at the present time from businesses to be more closely supported and informed by local government as an honest broker.

### ***Medium Term (by September)***

Develop Town based **lockdown lifting** plans for the settlements, which have been most significantly affected. These could be facilitated in conjunction with local people and representative groups. There was significant enthusiasm for getting directly involved in planning recovery by individuals responding to our survey.

These plans should incorporate all the short term measures set out above and those measures from the longer term (below) which can be moved forward quickly.

### ***Longer Term (next 12 months)***

- A pro-active use of a liberal approach to planning to stimulate investment, including replicating the Food Enterprise Zone model to create a Tourism Enterprise Zone. It is also worth exploring whether in conjunction with Government the Freeport concept could be applied to tourism locations creating a duty free environment in places such as Skegness and Mablethorpe.
- Developing a confidence building inward investment campaign promoting East Lindsey as a safe and high quality, e-enabled location for people who have been put off city-living by the pandemic. This approach effectively turns the relative remoteness of the area into a strength as opposed to the traditional, pre-pandemic view of it as a weakness.
- Assembling the resources for the servicing of more employment land to facilitate inward investment – one survey respondent described this as a “Fairfield #2” strategy.
- Ensuring the district is as effectively served by broadband and mobile provision as possible to support to enhanced future trend towards home and e-working arising from the pandemic.

## Links to Strategic Recovery Plan

Whilst the survey sample is small (as a consequence of the time available) it includes business from across the whole district and in all seven sectors identified in the Plan.

In terms of the wider assumptions in the plan:

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- Businesses agree that the current support offered will taper away leaving an impact on their businesses.
- Businesses do not expect, but would like to request an extension of these measures.
- Businesses do expect restrictions on movement and people to affect them for a considerable period.
- Banks are being more flexible, particularly to well established family businesses with good underlying trade patterns, than might have been expected.

In terms of the issues in the plan:

- Businesses identify lack of working capital as a challenge.
- Those business with the strongest cash flow profile are most optimistic.
- Trading arrangements in terms of debts, replacement of stock, credit ratings and access to finance are mixed, long term family businesses with local trust and access to non bank finance are best placed to adjust to these pressures.
- Businesses do not feel they have enough intelligence to indicate their long term intentions in relation to retaining furloughed staff but are generally not optimistic.
- Currently manufacturing businesses are not finding trading conditions, access to markets and their supply chains a significant challenge. Indeed the weak £ has increased market opportunities for exporters.
- Retail and accommodation businesses are experiencing all the impacts set out in the plan, as are construction and agriculture businesses.

### Opportunities for Intervention

The following proposed initiatives in the paper are also independently supported by businesses:

- Establish “Continuity and Recovery Networks”
- Promote an indigenous enterprise economy
- Kick start development by granting planning permission quickly
- Relaxation of licensing of tourism and entertainment businesses
- Extend the season on the coast
- Buy local procurement policies
- Relax local authority procurement processes
- Relax car park charges
- Business information and advice
- Reshaping local authority grants



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### **Resonances with the Visit Lincoln and GLLEP Survey: Impact of COVID-19 & Tourism Recovery**

This survey reveals a pattern of trading in East Lindsey, which matches the findings that 88% of tourism businesses are temporarily closed. It identifies in common with this survey that cash flow is a significant issue. It confirms business enthusiasm for ongoing support and information.

Looking specifically at current business pressures it resonates with the following reported pressures:

- Supplier/landlord understanding
  - Marketing, business advice and help to get up & running again
  - Guidance about reopening after lockdown
  - Working from home whilst furloughed
  - Bank loan holiday/insurance claim
  - Better publicity as to who is open for key workers (we are)
- Mid-term:
- Anything to support consumer confidence and the recovery curve
  - Not stopping the support whilst getting back on our feet
  - Improved marketing to get visitors back after lockdown has ended
  - More financial support if this goes to June and beyond
  - Major joined-up marketing of Lincolnshire
  - Business rates holiday
  - No set date for reopening so can't plan events.
  - Confidence that we won't get another wave

### Key Sources

“The effect of the COVID-19 pandemic on our towns and cities.” – Centre for Towns April 2020.

“Which local areas are most at risk in terms of impacts of coronavirus on employment?” Royal Society of Arts April 2020.

“Covid-19 and Rural Economies”, Centre for Rural Economy, University of Newcastle, April 2019.

“The Contribution of Age Structure to the Number of Deaths from Covid-19 in the UK by Geographical Units” – University of St Andrews April 2020

Fame Database for East Lindsey April 2020

Nomis Local Authority Profile for East Lindsey accessed April 2019

Supply, Use and Input-Output Tables, 1998-2016 – June 2019 – Scottish Government

## APPENDIX SURVEY KEY LINES OF ENQUIRY

Business	Activity
Beauty Box (S)	Beauty Salon
British Garden Centres (L)	Garden Centre
Childrens Links (M/L)	Childcare
Coastfields (L)	Leisure/Tourism
Countryside Art (S/M)	Manufacturer of Prints
David Regler – Maine Associates (S)	Small consultancy
Duncan Toplis (S/M)	Accountant
Dunes (S/M)	Leisure/Tourism
Europa Industries (M)	Packaging Manufacture
Fairburns Eggs (L)	Food Production and Wholesale
Fantasy Island (L)	Leisure/Tourism
Farmer Brown's Ice Cream (S)	Food Manufacture/Tourism
First College (S)	Learning Provider
Forrester-Boyd (S/M)	Accountant
G&S Oliver (S)	Motor Vehicle
Green Cottage Tea Room (S)	Hospitality
Hildreds Shopping Centre (M)	Retail
Househam Sprayers (M)	Engineering
Hunts Coaches (M)	Transport
John Chapelle Insight Accountants (S/M)	Accountants
Kirk Quality Foods (S)	Commercial Butchers
Lincs Digital (S)	Learning Provider
Lincs Training (S)	Learning Provider
Luxus (L)	Polymer Manufacturer
Macdonald Engineering Services (M)	Construction Engineering
Magna Vitae (L/M)	Leisure/Tourism

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Business	Activity
Micronclean (L)	Garment Rental and Sterile Consumables
Newbridge Tack and Feed (S)	Retail
Old School Architects (S)	Architects
Pocklington Bakery (M)	Food Manufacture and Retail
Polypipe (M/L)	Polymer Manufacture
Post and Pantry (S)	Post Office
Railway Tavern Cottages and Pub (S)	Hospitality
Rainbow Dreaming (S)	Leisure
Root2Recruit	Skills
Rufford Hotel (S)	Hospitality
Sam Borthwick Seasonal Beach Shop (S)	Retail
Seacroft Mobility (M)	Mobility Retail
Sid Dennis & Sons (M)	Waste and Recycling
Sprint Signs (S)	Sign Manufacture
Tattershall Park Farm (S/M)	Leisure/Tourism
The Mansion House (S)	Hospitality
The Storehouse (S)	Hospitality
Tong Engineering (L/M)	Engineering

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