

NTIA | NIGHT TIME INDUSTRIES ASSOCIATION

Night time Industry Association Survey

DCMS Questions: Proposals to Restart Sector Activity

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The Survey Results below were requested by DCMS to gain greater understanding of the sector specific challenges under the lockdown measures and around re-engagement into the marketplace following the release of lockdown.

We have been asked to indicate where HMG and/ or sector work may be required to address particular issues, and whether these issues are specific to the sector.

130 Respondents to the Survey (202 Submissions)

Business Types

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Nightclubs	30	23.1	23.1	23.1
	Restaurant	13	10.0	10.0	33.1
	Bar/Pub	40	30.8	30.8	63.8
	Bar/Restaurant	15	11.5	11.5	75.4
	Hotel	4	3.1	3.1	78.5
	Supplier	13	10.0	10.0	88.5
	DJ/Promoter	9	6.9	6.9	95.4
	Other	6	4.6	4.6	100.0
	Total	130	100.0	100.0	

CURRENT RESTRICTIONS ON WORKFORCE

QUESTION (1) Please estimate the % of the sector workforce falling into each of the following four categories, and provide further information (incl type of workforce), and level of uncertainty for each:

Under the current HMG Guidance, the estimated workforce falling into the following four categories is are as follows:

a. Work that is essential (as per HMG definition)

0% of the Workforce within the NTE & Events Sector would be considered Essential Workers within there NTE roles but many SIA Licensed Security are deemed Essential Workers but will be carrying out their role within the Retail Food Sector in terms of crowd management.

b. Work that can take place from home

10% of Workforce take part in work that can be done from home

- c. Work that cannot take place from home but is permitted under current HMG policy. **12% of Workforce Work that cannot take place from home but is permitted - HMG policy.**
- d. Work that is prohibited due to current HMG policy (e.g. settings that have closed), and/or cannot take place due to the impact of C-19 (e.g. reduced consumer demand) **86% of Workforce is furloughed due to many businesses being non permitted.**

The Night Time Economy & Events Sector falls outside of the HMG Essential Worker guidance, but many businesses have taken this opportunity to re model and adapt services within the guidelines so that ancillary revenue streams can be established.

Sole Directors and Senior Management spent the initial four weeks facilitating the furlough scheme across the workforce within individual businesses leading to their own furloughed position in the latter weeks of the lockdown.

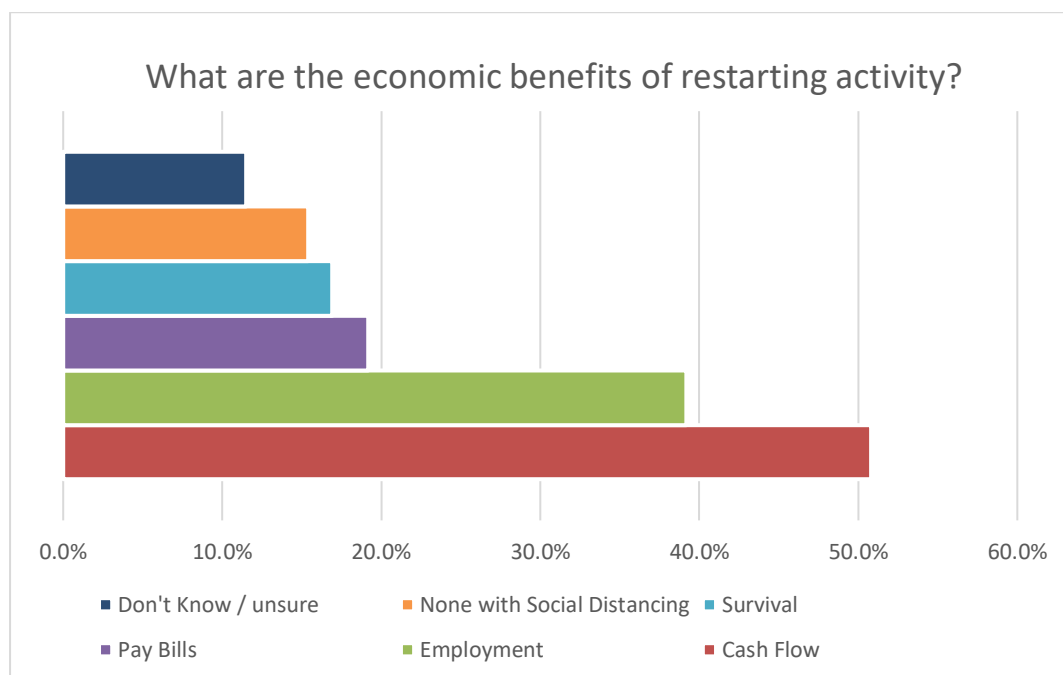
SIA Licensed Security Operators have taken roles in essential retail food outlets managing the social distancing measures and queues for food and drink.

Culminating in over 86% of the Hospitality Workforce being furloughed, but not within the working environment and unable to work from home in their current role.

ECONOMIC & SOCIAL

QUESTION (2) What are the Economic Benefits of Restarting Activity within the Sector?

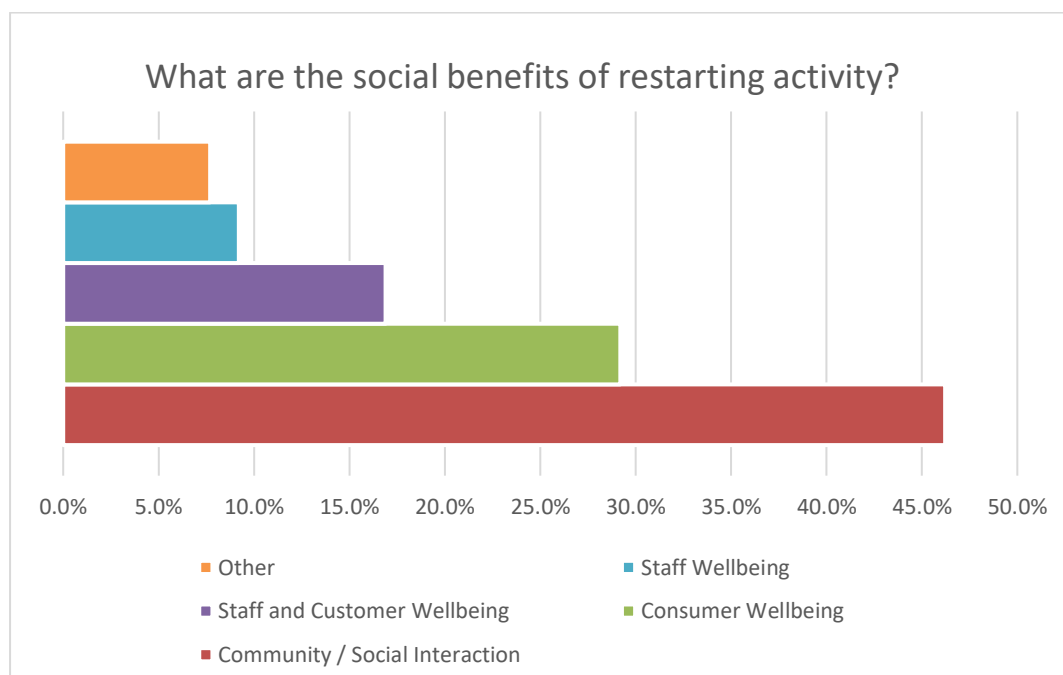
Cashflow	50.8%
Employment	39.2%
Pay Rent / Bills	19.2%
Survival of Business	16.9%
None if there is still Social Distancing	15.4%
Don't Know	6.9%
Other	4.6%



	Cash flow	Employment	Pay Bills	Survival	None if SD	Don't know	Other
Nightclub	17	17	8	4	3	2	1
Restaurant	8	4	2	4	1	1	1
Bar/pub	17	15	6	6	9	3	2
Bar/restaurant	6	2	3	4	5	3	0
Hotel	3	3	1	1	0	0	0
Supplier	8	7	2	1	1	0	0
DJ/promoter	4	2	1	1	1	0	2
Other	3	1	2	1	0	0	0
Total	66 (50.8%)	51 (39.2%)	25 (19.2%)	22 (16.9%)	20 (15.4%)	9 (6.9%)	6 (4.6%)

QUESTION (3) What are the Social Benefits of Restarting Activity within the Sector?

Community & Social Interaction	46.2%
Customer Well Being Mental Health & Happiness	29.2%
Staff & Customer Well Being	16.9%
Staff Welfare	9.2%
Other	7.7%



QUESTION (4) What are the Costs of Restarting Activity within the Sector?

Numeric Answer: Average Cost £31,131

Text Answer: Social Distancing Incompatible with Business Types

Average Start Up Costs by Business Type following Lockdown:

Business Type	Mean	N	Std. Deviation
Nightclub	61545.45	11	94373.051
Restaurant	25500.00	9	34538.023
Bar/pub	17838.89	18	22577.895
Bar/restaurant	22125.00	4	25292.868
Hotel	15875.00	4	23124.212
Supplier	43525.00	4	71875.604
DJ/promoter/musician	41333.33	6	78400.680
Other	11666.67	3	12583.057
Total	31130.51	59	54869.024

QUESTION (5) What are sector projections for revenues and consumer demand, and would resuming activity be viable with those projections?

Projection of % Revenue & Footfall over three months following Lockdown Release:

Revenue	42.5%
Footfall	43.3%

QUESTIONS (6) Will your business be viable under the projected revenues and consumer demand above?

YES	36.2%
NO	63.8%

Unsurprisingly viability was influenced by business type, perhaps surprisingly it was restaurants, DJs and promoters who said their businesses were most threatened and suppliers, hotels and nightclubs who said less so:

Business Type Viability Crosstabulation

		Viability			
		0	1	Total	
Business Type	Nightclub	Count	16	14	30
		% within Business Type	53.3%	46.7%	100.0%
		% within @5Viability	19.3%	29.8%	23.1%
		% of Total	12.3%	10.8%	23.1%
Restaurant		Count	11	2	13
		% within Business Type	84.6%	15.4%	100.0%
		% within @5Viability	13.3%	4.3%	10.0%
		% of Total	8.5%	1.5%	10.0%
Bar/Pub		Count	29	11	40

	% within Business Type	72.5%	27.5%	100.0%
	% within @5Viability	34.9%	23.4%	30.8%
	% of Total	22.3%	8.5%	30.8%
Bar/Restaurant	Count	13	2	15
	% within Business Type	86.7%	13.3%	100.0%
	% within @5Viability	15.7%	4.3%	11.5%
	% of Total	10.0%	1.5%	11.5%
Hotel	Count	2	2	4
	% within Business Type	50.0%	50.0%	100.0%
	% within @5Viability	2.4%	4.3%	3.1%
	% of Total	1.5%	1.5%	3.1%
Supplier	Count	3	10	13
	% within Business Type	23.1%	76.9%	100.0%
	% within @5Viability	3.6%	21.3%	10.0%
	% of Total	2.3%	7.7%	10.0%
DJ/Promoter/Musician	Count	7	2	9
	% within Business Type	77.8%	22.2%	100.0%
	% within @5Viability	8.4%	4.3%	6.9%
	% of Total	5.4%	1.5%	6.9%
Other	Count	2	4	6
	% within Business Type	33.3%	66.7%	100.0%
	% within @5Viability	2.4%	8.5%	4.6%
	% of Total	1.5%	3.1%	4.6%
Total	Count	83	47	130
	% within Business Type	63.8%	36.2%	100.0%
	% within @5Viability	100.0%	100.0%	100.0%
	% of Total	63.8%	36.2%	100.0%

QUESTION (7) What proportion of the Sector Workforce would you expect to return to work if activity started?

<25%

26% - 39%

40% - 59%

60% - 79%

80% +

Average **55.1%**

PUBLIC HEALTH

QUESTION (8) What are the public health considerations for restarting activity? Please state any expectations or projections for PPE and testing requirements for workers and/ or consumers.

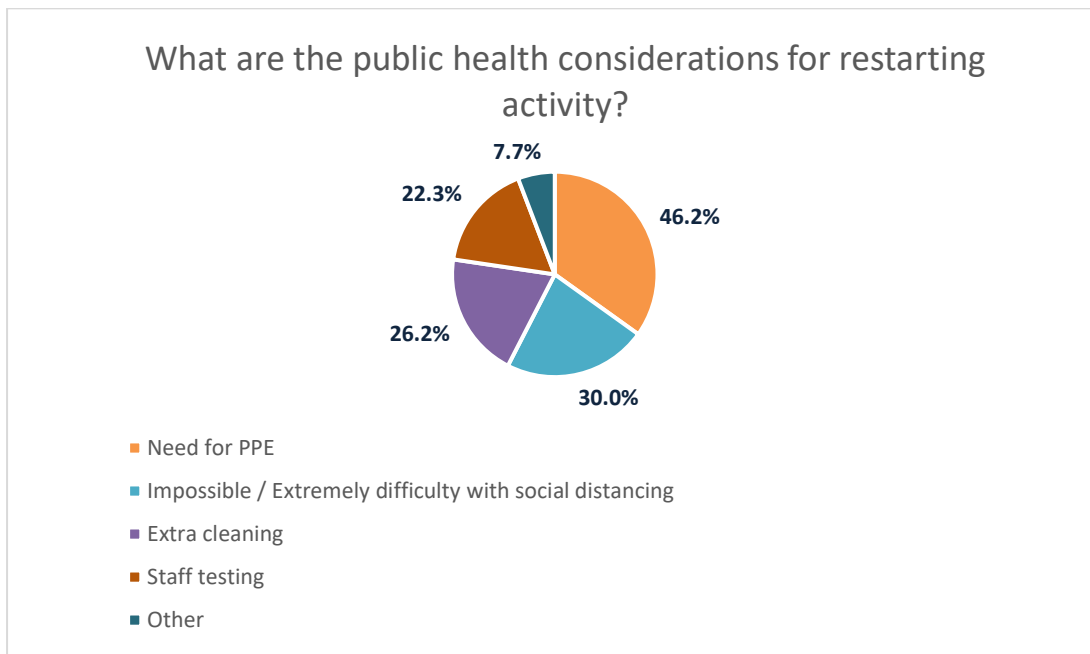
Need for PPE

45.4%

Impossible/Extremely Difficult with Social Distancing

30%

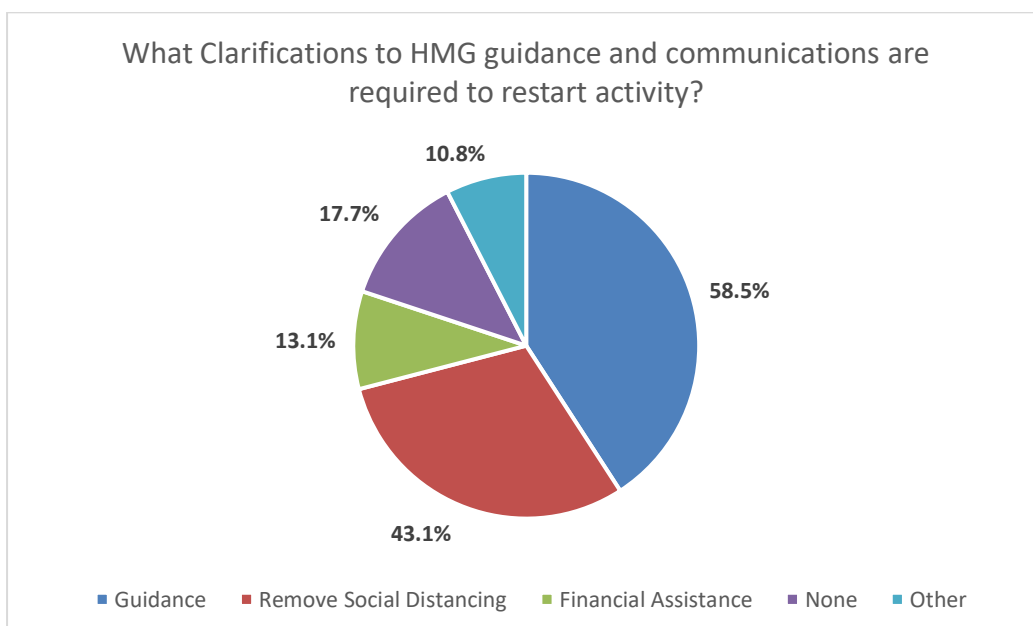
Extra Cleaning Schedules	26.2%
Staff Testing & Safety	22.3%
Other	7.7%



IMPLEMENTATION

QUESTION (9) What clarifications to HMG Guidance and Communications are required to restart activity, and Why?

Guidance	58.5%
Remove Social Distancing	43.1%
Financial Assistance	13.1%
None	17.7%
Other	10.8%



QUESTIONS (10) What clarifications to HMG guidance and communications are required to restart activity, and why? & QUESTION (11) What changes to HMG guidance and communications are required to restart activity, and why? Both questions were answered together.

Social Distancing Measures	93.8%
Narrative & Public Perception	70.8%
Financial Viability	68.5%
PPE & Safety Equipment	63.8%
H&S Policy & Risk Assessments	58.5%
Staff Training & Communication	52.3%
Suppliers	31.5%
Security Resource	28.5%

QUESTION (12) What are the next steps for addressing these?

Free Text – No Answers Given

QUESTION (13) What is the estimated lead-in time for the sector to restart activity?

2 -3 Weeks

3 -4 Weeks

4 – 5 Weeks

6+ Weeks

Average 22.9 Days

Overview of Survey

The short lead time with which the survey was required has given a very limited response with 130 Completed responses to the survey, with 202 submissions.

The key messages from the survey are based on the following headers:

Clarification: Understanding of Timeline and Required Public Health Measures

Financial Viability & Support: Without an understanding of the measures the government will place on NTE Businesses and Events in terms of Social Distancing/PPE, the level of financial support and the timeline with which these measures and provision will be put in place has left the industry in an untenable position, effectively moth balling many businesses across the country. 63.8% of Business feel they will not be Financially viable at over the first three months of re-engagement and will only be operating at approx. 40-43 % of capacity.

Workforce: 86% of the workforce has been furloughed and there is a clear understanding across the sector that only a proportion of the sector staff will return to their roles. According to the survey 55% of the workforce will return, in particular we have had some feedback from the Private Security Sector which believe that over 60% of the Workforce will not return leaving a huge hole in the security sector and subsequently leaving NTE & Events sector exposed.

Social Distancing: Business Owners and Operators are concerned that the Social Distancing will reduce venue capacity, where it will become financially unviable. Many realise that the social

engagement business model and the spaces with which they operate will not work with proposed restrictions by Government.

Reverse the Narrative: Many feel that once it is safe to release lockdown the Government need to ensure that they reverse the narrative in terms of the Sector being “Safe & Open”. Most businesses believe they will be able to re-engage within 3 weeks (22.9 Days).

Key Quotes from Responses:

“Social distancing is incompatible with businesses selling social interaction. You do not go to a bar to get drunk. You go to a bar to socially interact with people. Asking hospitality businesses to practice social distancing is a bit like trying to sell someone a car they cannot drive.”

Quite a few comments around only being able to partially open or be financially viable while social distancing model is in place – “They need to realise we cannot open partially whilst still paying all our bills, i.e. electricity for 10 people the same as 100. Atmosphere in pubs will be damaged and will do more harm than good”

“Penalties for guests who behave in an unsafe manner, will businesses be penalised if guests do not cooperate with distancing measures, can we process multiple incidences of sick pay for staff if they must isolate? Can we refuse hours to staff who we believe are required to self-isolate or will they still be permitted furlough?”

“From what I can tell there is currently no guidance on how we could feasibly operate social distancing in either restaurants (between staff and customers) or pubs and clubs (seems impossible). In addition, with the way alcohol effects the decision-making processes, is it feasible to expect customers to adhere to social distancing. How would we be expected to control social distancing in outdoor areas with naturally high footfall?”