Wales Tourism Business Barometer 2020

Covid-19 Impact Wave 5 Report

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Wales Tourism Business Barometer 2020: Covid-19 Impact Wave 5 Report.

Anthony Lydall, Strategic Research and Insight

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

For further information please contact:
Research and Insights Team
Visit Wales
Economy, Skills and Natural Resources Group
Cathays Park
Cardiff
CF10 3NQ

Email: tourismresearch@gov.wales

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1. Headline Findings

Survey method and timing

1.1 We have conducted 801 telephone interviews with tourism business owners and managers between 16th and 29th September. Please see Section 2 for more details on the method.

Bookings since reopening

1.2 Most (87%) businesses are now open again. 29% of open businesses have had more customers since reopening than they would normally have during that period, 40% have had the same level, and 31% have had fewer. The percentage of businesses reporting ‘more customers than normal’ since re-opening has increased considerably for most sectors since the previous research wave which reported in early August. All sectors reported an increase except for activity providers.

1.3 The self catering and caravan & camping sectors have performed well since reopening – better than normal on balance. 37% of self catering operators have had more customers than normal since reopening, and 49% have had the same level. Similarly, 38% of caravan & campsites have had more customers than normal, and 45% have had the same level.

1.4 Activity providers remain the hardest hit sector. 75% of those open have had fewer customers than normal. There is quite a strong reliance in the sector on school trips, which are not happening currently.

Capacity levels and impact on performance

1.5 About two in five (39%) of those open are operating at full capacity. The self catering sector differs significantly from the other sectors – 59% of open self catering businesses are fully open.

1.6 Among those operating at reduced capacity, the levels continue to vary considerably from near full capacity to less than 10% capacity.

1.7 As in the previous survey, performance correlates strongly with open capacity. 43% of fully open businesses have had more customers than normal, 46% have had the same level and only 11% have had fewer. Fully open businesses have been able to capitalise on strong domestic demand.

1.8 This compares to 20% of partially open businesses having more customers than normal, 35% having the same level, and 45% having fewer.

South West Wales is performing well; South East Wales is not

1.9 South West Wales has seen strong demand for staycations, and its industry has been able to capitalise on it. 39% of open businesses in South West Wales have had more customers than normal since reopening, and 39% have had the same level.

1.10 South East Wales is not having the same fortune. 18% of open businesses have had more customers than normal and 32% have had the same level. But 50% have had fewer.

Moving into uncertain times again

1.11 At the time of interviewing one in six (17%) businesses had more bookings than normal for October and November, 40% had the same level, but 43% had fewer.

1.12 However, many areas of Wales and across the UK moved back into lockdown during the fieldwork for this research wave. The restrictions for Blaenau Gwent, Bridgend, Merthyr Tydfil and Newport occurred almost halfway during fieldwork.

1.13 34% of businesses interviewed before the lockdown for these four counties said that they had fewer bookings than normal for October and November. However, this rose to 53% of business interviewed after these lockdowns. It also affected businesses who were not in lockdown at that point with those reporting fewer bookings increasing in north, mid and South West Wales. The biggest change was seen in South West Wales. A quarter of businesses interviewed before this lockdown had fewer forward bookings than normal, compared to 50% of businesses interviewed after this lockdown.

1.14 In light of this and wider accounts since then, it is likely that forward bookings will have decreased since this data was collected, as further local lockdowns have been introduced across Wales and across the UK.

Redundancies remain quite low for now

1.15 As the furlough scheme draws towards its conclusion at the end of October and is succeeded by a salary top-up scheme, jobs in the Wales tourism industry mostly continue to survive for now. 4% of businesses have made redundancies. Among the sample of 801 businesses, 44 full time permanent staff have been made redundant to date, and 21 part time permanent staff.

Stabilised loss of revenue for some

1.16 The median loss per business from the crisis lies towards the top end of £10,000 to £25,000 – the same result as in the previous survey. 13% of businesses reported losses ranging between £100,000 to £1m plus.

1.17 A few self catering businesses have even managed to gain back some of their losses by having an excellent period since reopening, but others continue to struggle.

1.18 The median reported loss as a result of the crisis is 41 – 50% of normal revenue for the whole year. This is also the same as in the previous survey. Although one in five companies reported losses of over 70% of normal revenue.

Survival outlook

1.19 Most (73%) businesses expect to survive longer than the next six months. Only 5% of operators say they don't expect to survive the next six months.

1.20 Among businesses who expect to survive less than six months, the most frequently answered value of additional funding required to survive is in the £10,001 to £25,000 range. Although around 14% of businesses needed between £50,001 and £1m[1].

[1] There is a small sample size to this question and, therefore, an element of caution needs to be applied when interpreting these findings.

2. Background and Methodology

What is the Wales Tourism Business Barometer?

2.1 The Wales Tourism Business Barometer is designed to give quick feedback on how the tourism industry in Wales is performing at key times during the year.

2.2 This survey is the fifth wave to research the impact of the Covid-19 outbreak on the tourism industry.

How was the Survey conducted?

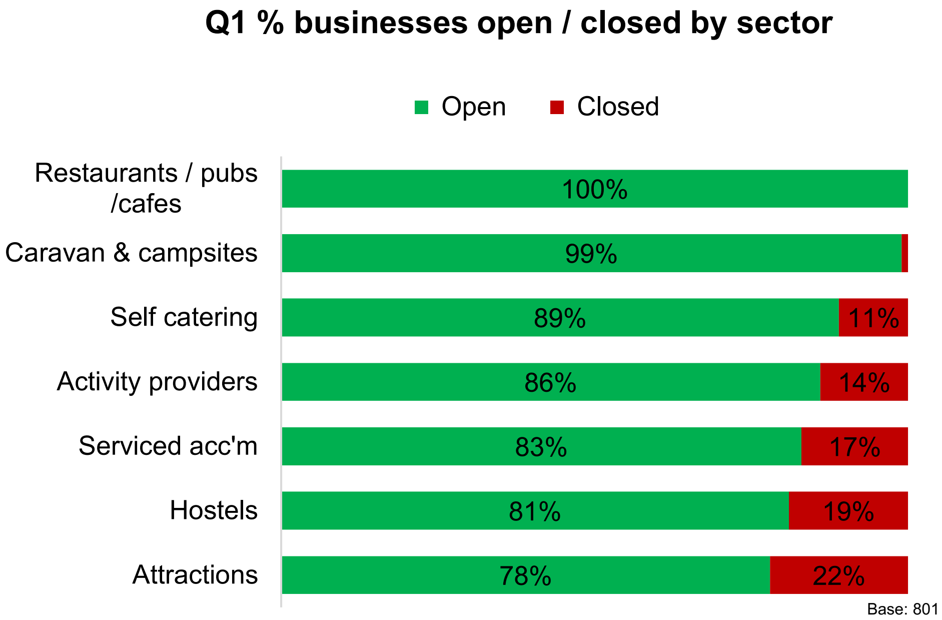
2.3 We have conducted 801 interviews by telephone. This makes results of questions asked to everyone accurate to ±3.5%. The sample is reflective of the tourism industry in Wales and is shown below by sector and region:

Sector / Region	North	Mid	South West	South East	Total
Serviced accommodation	93	46	71	61	**271**
Self-catering	85	45	100	34	**264**
Caravan / campsites	39	14	22	8	**83**
Hostels	6	7	8	5	**26**
Attractions	25	13	18	22	**78**
Activity operators	17	8	12	5	**42**
Restaurants / pubs / cafes	8	8	11	10	**37**
Total	**273**	**141**	**242**	**145**	**801**

2.4 73% of businesses in the sample are graded by Visit Wales. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes, attractions and activity operators, where grading is not applicable. All telephone interviews have been conducted with business owners or managers between 16th and 29th September.

3. Opening Capacity

Businesses open / closed



Most are open

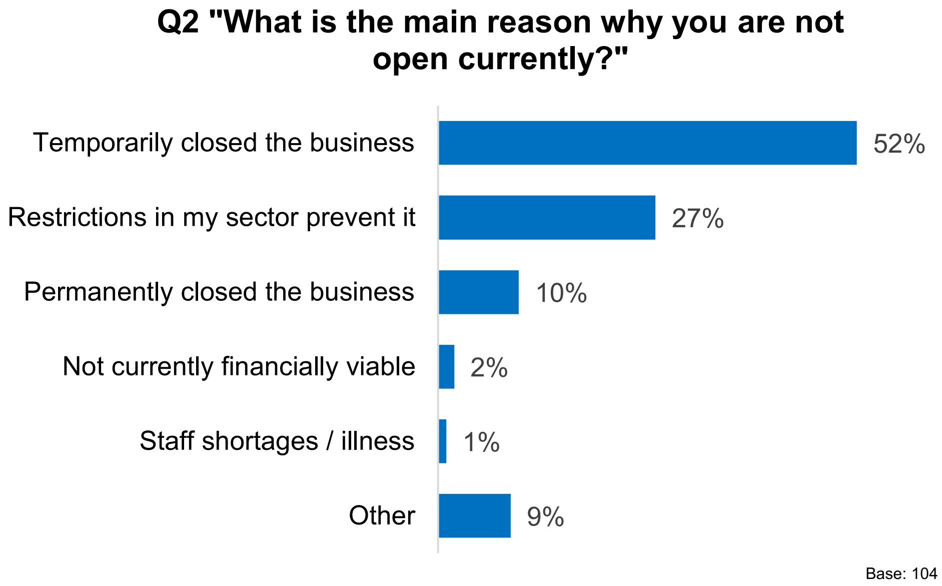
3.1 Most (87%) tourism businesses are now open again. Accommodation where guests were already more distanced from each before the pandemic – self catering and to some extent caravan & campsites – is more likely to be open than hostels and serviced accommodation, where operators have faced challenges to keep their guests socially distanced.

3.2 More attractions (78%) are now open compared to when the previous survey was conducted late July (53%). Some attractions are run by local authorities and comments show that the pressure to reopen is not the same as for commercial businesses. Some staff have at times been redeployed to other roles within their local authority.

"The place is run by the council so when it was closed in lockdown they managed to find other jobs for the staff to do."
Attraction, South East

"We are run by the council so we were all given alternative work while in lockdown. We decided to close until February now due to the fact that most of our winter takings are from school groups and halloween/xmas events, which are not viable at the moment."
Attraction, South East

Reasons for remaining closed



Q2 has been asked to businesses currently closed

Keep the virus out of my house

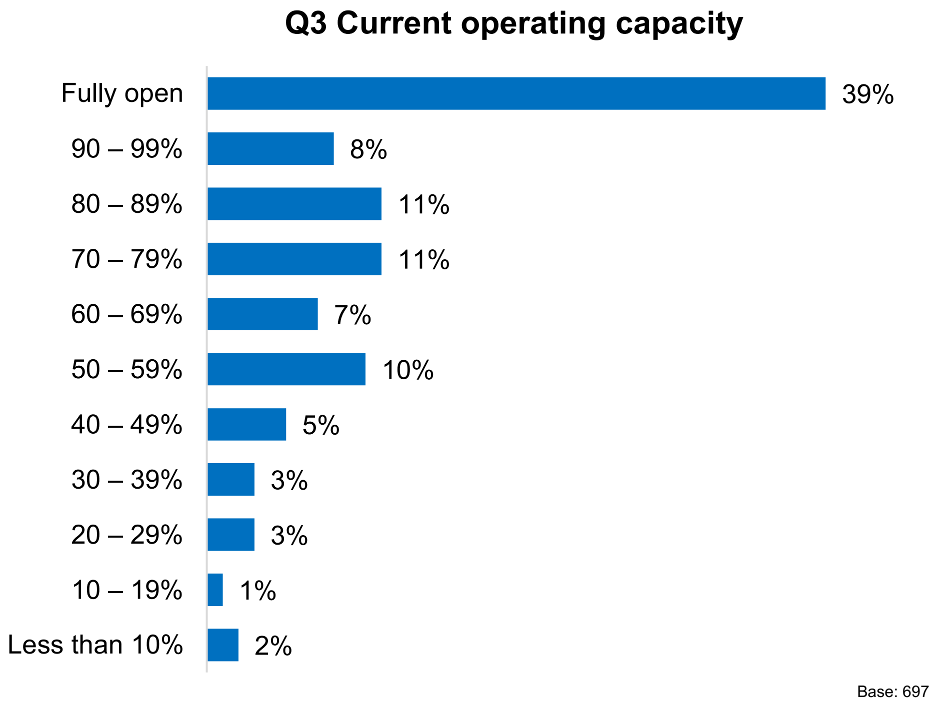
3.3 Among closed businesses, many have no immediate plans to reopen. Open comments show that the main reason is wanting to wait until the pandemic has passed. This if often where operators are elderly and do not want customers from other areas bringing the virus into their property, which could also be their home.

3.4 Tourism is not always the main income for such operators, and so they are not under pressure to reopen. Keeping safe outweighs the benefit of additional income.

> *"I've decided to close my business down after 15 years and I'm just waiting until all this Covid-19 stuff goes away, which might not be for a while. Since it's not my main source of income however I've managed to cope with the situation."*
> Self catering, South East

> *"I am currently shielding at the moment so I had to shut the cottage down because it would be too risky for my health to have visitors come. I'm also not planning to open anytime soon since it looks like a second wave is coming."*
> Self catering, South East

Operating capacity



The base for the above results is businesses which are open

Capacity levels continue to vary considerably

3.5 About two in five (39%) of those open are operating at full capacity. The self catering sector differs significantly from the other sectors – 59% of open self catering businesses are fully open. Guests are in self-contained units, although a common reason for even self catering not operating at full capacity is the extra time being left in between guests for cleaning.

> *"I've closed off a third of the cottages as it's not possible to clean them all in time for new guests"*
> Self catering, South West

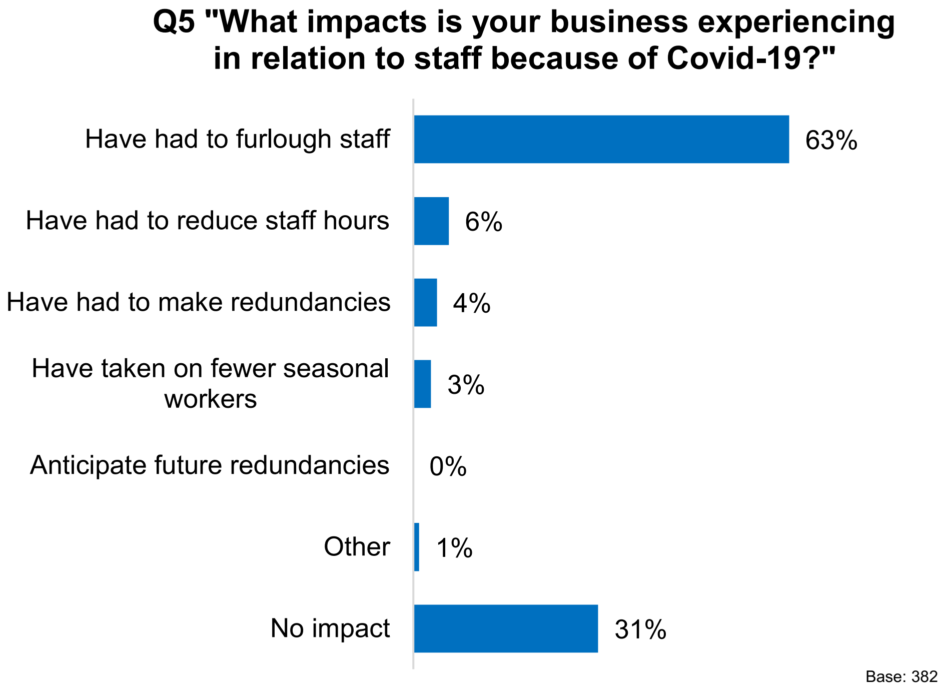
3.6 Activity operators continue to face many challenges. 30% are operating at less than 30% capacity.

3.7 Restaurant, pubs and cafes also face challenges with capacity. Around half (49%) of these are operating at less than 60% capacity. The table below shows the operating capacity by sector:

Current operating capacity	Sector						
	Serviced acc'm	Self catering	Caravan / campsites	Hostels	Attractions	Activity providers	Rest'rnt / pubs / cafes
Fully open	36%	59%	34%	24%	28%	14%	-
90 – 99%	10%	9%	11%	-	-	3%	5%
80 – 89%	14%	5%	18%	14%	7%	25%	11%
70 – 79%	14%	9%	7%	14%	10%	11%	11%
60 – 69%	8%	6%	9%	-	3%	6%	24%
50 – 59%	8%	7%	11%	19%	25%	8%	14%
40 – 49%	5%	3%	4%	14%	7%	3%	16%
30 – 39%	1%	-	4%	-	8%	-	19%
20 – 29%	2%	1%	2%	5%	7%	8%	-
10 – 19%	1%	-	-	-	5%	8%	-
Less than 10%	-	2%	-	10%	2%	14%	-
Base:	*226*	*234*	*82*	*21*	*61*	*36*	*37*

4. Impact on Staff

Impact on staff in general



Q5 has been asked to operators which employ staff

Similar results to last time

4.1 The main impact of Covid-19 on staff in the industry remains furloughing, but redundancies are still quite low for now.

4.2 Among the sample of 801 businesses, 44 full time permanent staff have been made redundant to date, and 21 part time permanent staff.

4.3 The proportion of businesses (which employ staff) furloughing staff by region is as follows:

- North Wales – 74%
- Mid Wales – 53%
- South West Wales – 52%
- South East Wales – 65%

4.4 The proportion of businesses (which employ staff) furloughing staff by sector is as follows:

- Attractions – 70%
- Serviced accommodation – 69%
- Activity providers – 67%
- Caravan / campsites – 63%

- Restaurants / pubs / cafes – 50%
- Self catering – 47%
- Hostels – 42%

Action	Total no. employed	Av. Staff furloughed / with reduced hours / redundant *(Base: all businesses which employ staff)*
Staff currently on furlough	1	0.4
	2	1.1
	3	1.1
	4	1.2
	5	1.8
	6 – 10	1.8
	11 – 50	3.8
	Over 50	28.7
	Overall	2.8
Staff with reduced hours	Overall	0.4
Staff made redundant	Overall	0.2

The averages for staff with reduced hours and redundancies are not split by business size due to low base when split

Reduction in staff currently on furlough

4.5 On average, 2.8 people per tourism business employing staff are currently furloughed. This is much lower than in the previous wave, when the average was 7.5.

4.6 The splits by region for furloughing are as follows:

Region	**Av. Staff furloughed** *(Base: all businesses which employ staff)*
North Wales	1.7
Mid Wales	1.2
South West Wales	1.8
South East Wales	6.3

4.7 The South East sample includes a number of large businesses employing many staff.

5. Impact on Revenue

Loss in revenue

Q16 "… how much revenue has your business lost so far due to the Covid-19 crisis?"	
Haven't lost any revenue	5%
Up to £1,000	1%
£1,001 – £2,500	1%
£2,501 – £5,000	7%
£5,001 – £10,000	16%
£10,001 – £25,000	25%
£25,001 – £50,000	23%
£50,001 – £100,000	10%
£100,001 – £250,000	4%
£250,001 – £500,000	6%
£500,001 – £1,000,000	1%
More than £1,000,000	1%
Base	*379*

The above results exclude those not knowing or preferring not to answer this sensitive question

Lost revenue has stabilised for some since last wave

5.1 The median loss per business lies towards the top end of £10,000 to £25,000 – the same result as the previous survey. 13% of businesses reported losses ranging between £100,000 to £1m plus.

5.2 It seems that some businesses have managed to 'stop the rot' over the summer and have not seen their loss this year grow higher. A few self catering businesses even say they are now making back some of the earlier loss, but others continue to struggle.

"As we have been so busy, we're now starting to make some of the money back"
Self catering, Mid

"All of our costs are kicking back in now such as mortgage holidays, insurance breaks on vehicles as well as furlough ending. I won't be able to keep things going when these costs come back in"
Attraction, North

5.3 Sample sizes for most sectors are not large enough to compare reliably due to so many not able or willing to answer the question. In any case, there is no indication of significant differences by sector.

5.4 The median loss per business differs by size of business. The table below shows the approximate median loss per business by no. of employees. These results are the same as in the last survey:

No. of permanent paid staff	Approx. median range loss in revenue to date
None	£10,000 to £25,000
1 – 5	£25,000 to £50,000
6 – 10	£100,000 to £250,000
11 – 50	£250,000 to £500,000
More than 50	£1,000,000

5.5 The table below shows the proportion of normal annual revenue lost from business who said that they have lost revenue. Around a fifth have lost over 70% of their annual revenue.

Q17 "And roughly what proportion of your normal annual revenue does that loss represent so far?"	
<3% loss	1%
3 – 5% loss	-
6 – 10% loss	1%
11 – 15% loss	-
16 – 20% loss	1%
21 – 30% loss	14%
31 – 40% loss	19%
41 – 50% loss	21%
51 – 60% loss	15%
61 – 70% loss	7%
71 – 80% loss	11%
Over 80% loss	10%

Base: 322

Losses have stabilised for some

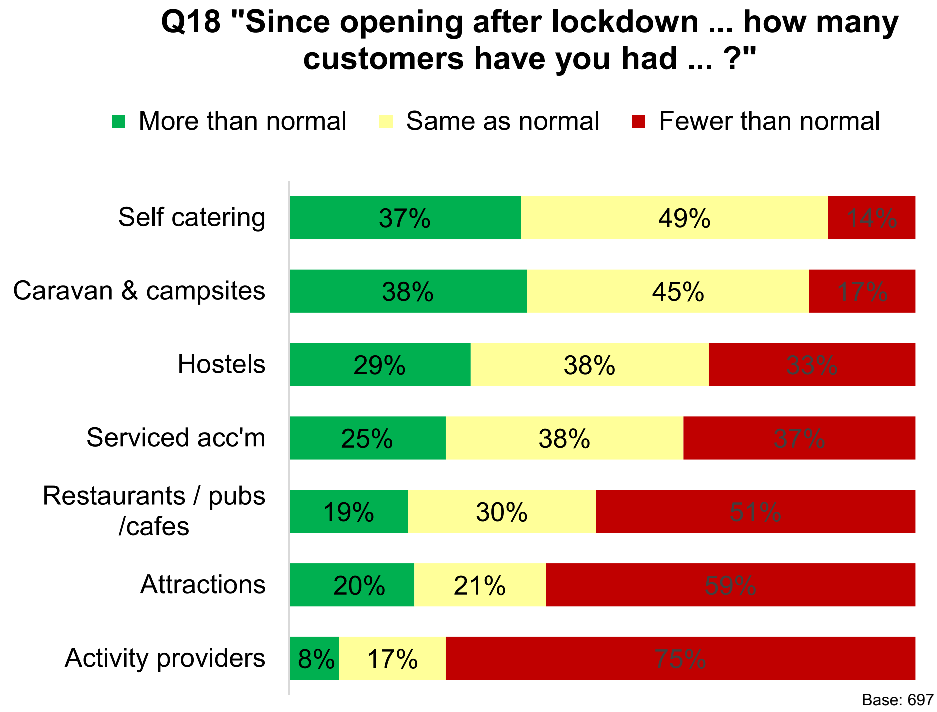
5.6 The median reported loss as a result of the crisis is 41 – 50% of normal revenue for the whole year. This is same result as in the previous survey.

5.7 As with Q16, sample sizes by sector are mostly not sufficient to compare results reliably, except for the serviced and self catering sectors. The median loss of annual turnover for self catering businesses lies in the 31 – 40% range, whereas for serviced business it is between 51 and 60%. Comments show that some self catering businesses have been clawing back income from previously postponed / cancelled bookings.

"All the people we have now are the people who were postponed during lockdown"
Self catering, North

6. Performance since Reopening – Current and Advance Bookings

Current performance



Q18 has been asked to open businesses

Significant variation by sector

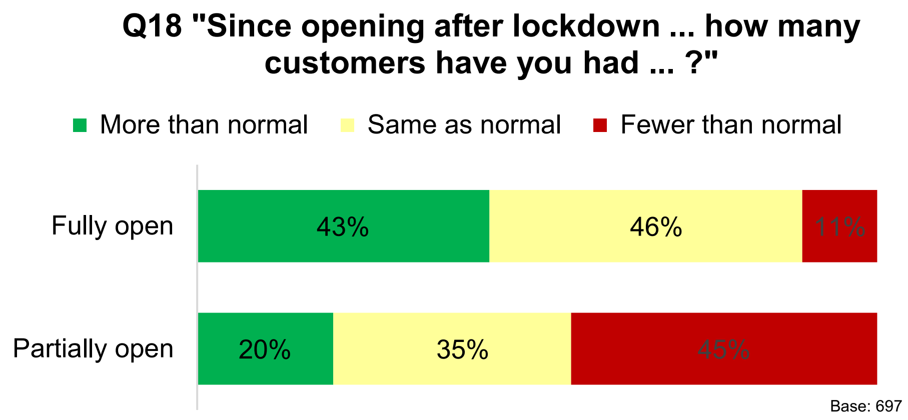
6.1 29% of open businesses have had more customers since reopening than they would normally have during that period, and 40% have had the same level. All of the accommodation sectors have performed better on balance than the non-accommodation sectors. The more 'contained' sectors – self catering and caravan parks – have fared particularly well since reopening.

"People are desperate to get away so we've been busier than ever since we reopened"
Self catering, South West

6.2 Activity providers have not fared well at all since reopening. Some are very reliant on school trips, which are not happening.

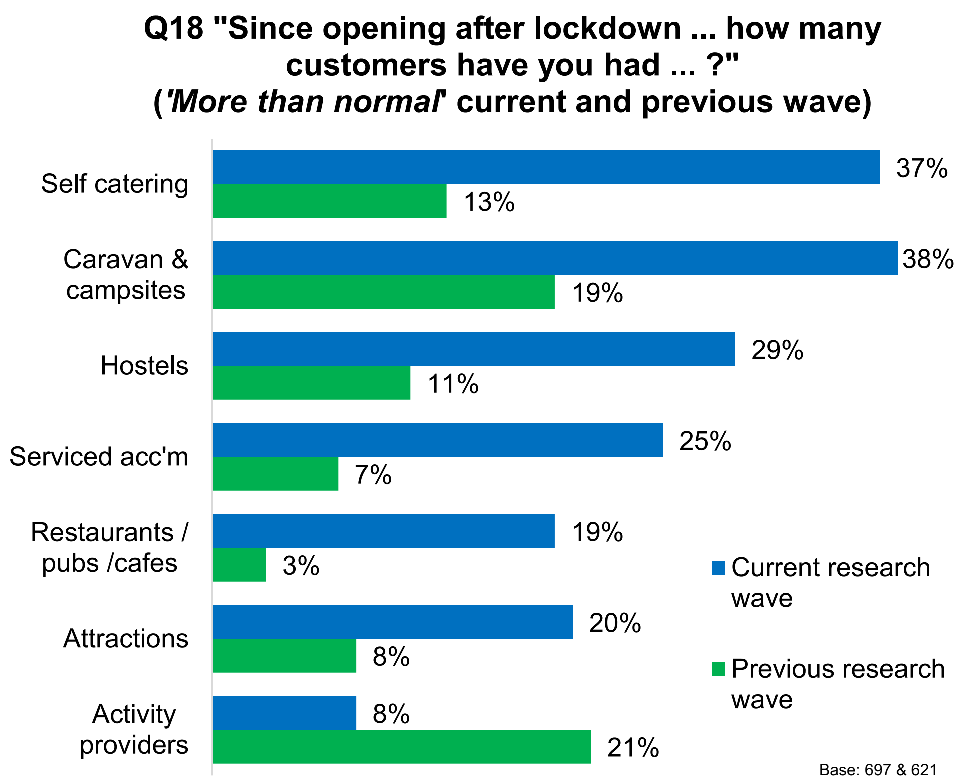
"No schools are actually allowed to book with us by law so we've lost all of our custom we'd have"
Activity provider, Mid

"We are so school dependent, and we aren't allowed to have school trips over until at least 2021. As a result of this we have lost the majority of our autumn and winter bookings."
Activity provider, Mid



6.3 As in the previous survey, the level of bookings compared to normal correlates strongly with open capacity. Fully open businesses have performed very well since reopening as they have been able to capitalise on the high demand. Partially open businesses have not been able to take advantage of the demand in the same way.

Difference since previous research wave

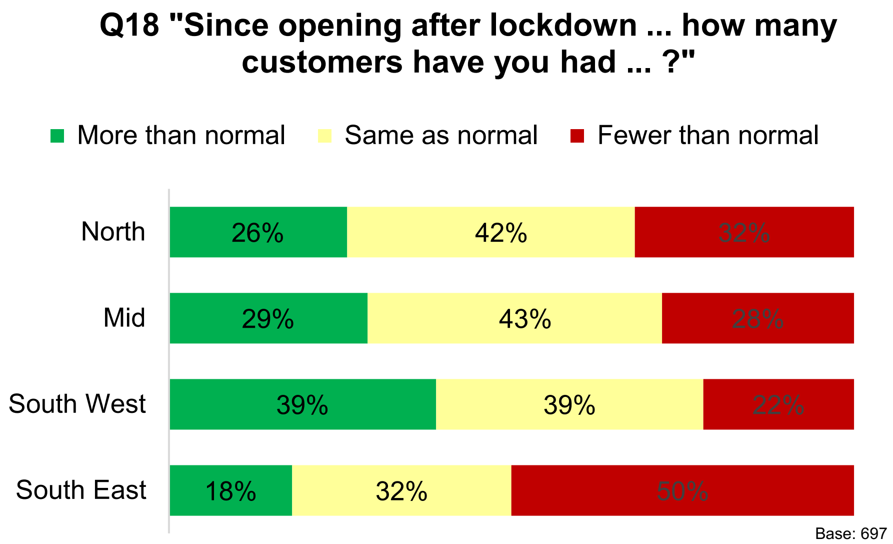


6.4 The percentage of businesses reporting 'more customers than normal' since re-opening has increased considerably for most sectors since the previous research wave, conducted between 27th July and 6th August. This is especially so for the self catering sector, with 13% of these reporting more customer than normal in the previous wave compared to 37% in the current wave.

6.5 A few comments from businesses suggest that they have seen an increased demand for staycations due to quarantine rules for travelling overseas. However, the change in the results may also be due to the fact that this research wave includes the whole summer period, whereas the previous wave only included levels of customers up until the 6th of August, at the latest.

6.6 Activity providers are the only sector not to have reported more customers than normal compared to the previous research wave. This could relate to reduced capacity to meet social distancing rules, with some saying they have been particularly affected by these rules. Not being able to accept school visits, which would normally have started from September, is also likely to have had a significant impact.

Differences by region



6.7 South West Wales has performed well since reopening as holidaymakers have sought staycations.

"Pembrokeshire has never been so busy with tourists"
Serviced, South West

"At the moment we are turning people away – we could probably fill the hotel double"
Serviced, South West

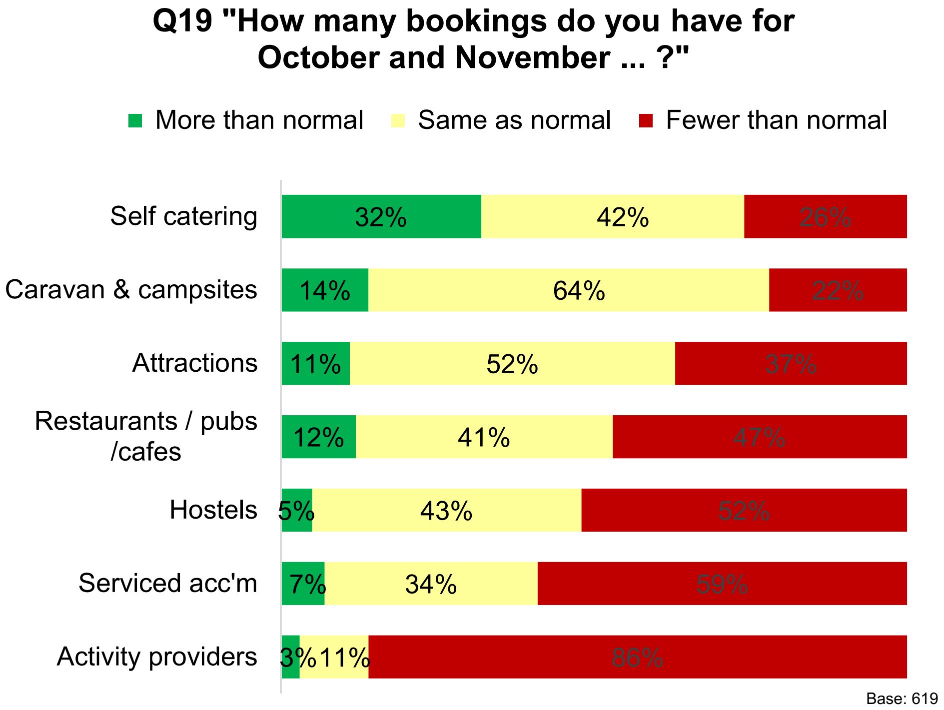
"Customers are telling us that they usually go abroad but are coming to Wales instead, as they have no choice. We're getting fantastic reviews – they love it here."
Self catering, South West

“Since we reopened in mid July, we've been busy with people who were due to be sat on a beach in Spain or France or Portugal. Everyone's doing 'staycations' instead.”
Serviced, Mid

6.8 Tourism in South East Wales is struggling however. Cardiff often hosts large events, and events are not happening.

“I think the rural and beach areas are doing quite well at the moment, but city areas are struggling a lot”
Serviced, South East

Advance bookings for October and November



The base for Q19 is businesses which are open / plan to reopen, and take bookings

Less positive forward picture

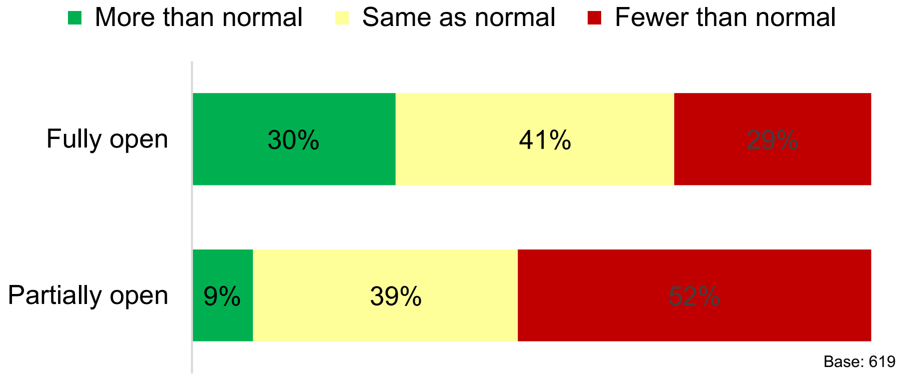
6.9 At the time of interviewing, 17% of businesses open or planning to open had more bookings than normal for October and November, 40% had the same level and 43% had fewer. The self catering and caravan sectors look stable, but prospects do not look good for serviced accommodation unless bookings come in at the last minute.

6.10 However, many local lockdowns in Wales and across the UK have been introduced during the fieldwork for this research wave. Whilst some of these occurred at the start of fieldwork, and others at the end of fieldwork, the restrictions for Blaenau Gwent, Bridgend, Merthyr Tydfil and Newport occurred almost halfway during fieldwork. 53% of interviews took place before this lockdown began and 47% of interviews took place after.

6.11 34% of businesses interviewed before these lockdowns said that they had fewer bookings than normal for October and November. However, this rose to 53% of business interviewed after this lockdown. It also affected businesses who were not in lockdown at that point with those reporting fewer bookings increasing in north, mid and south west Wales. In light of this and wider accounts since then, it is likely that forward bookings will have decreased since this data was collected, as further local lockdowns have been introduced across Wales and the UK.

"In the last couple of days we've had four customers from South Wales regions cancel their stay with us due to them being in local lockdown"
Caravan park, North

Q19 "How many bookings do you have for October and November ... ?"



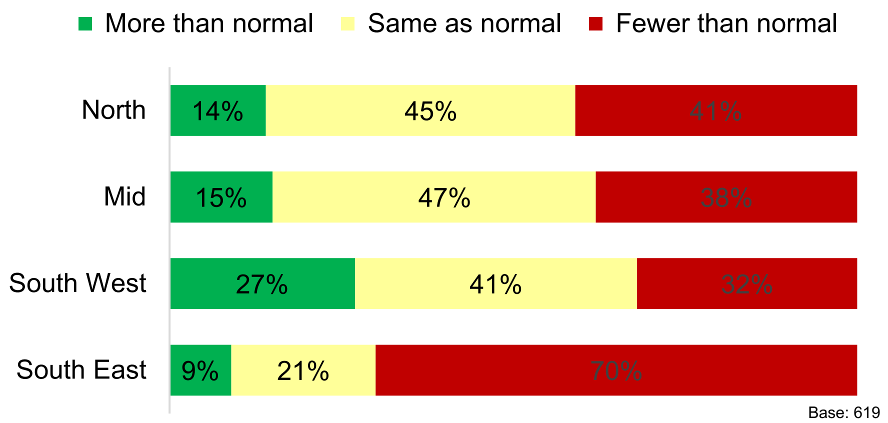
6.12 As with performance since reopening, bookings levels going forwards correlate strongly with opening capacity.

"We have had a lot of enquiries recently but we haven't been able to accommodate the demand"
Restaurant, Mid

"We have had a lot more enquiries for October but due to our restrictions on occupancy we will be taking in fewer people compared with last year"
Caravan park, North

Differences by region

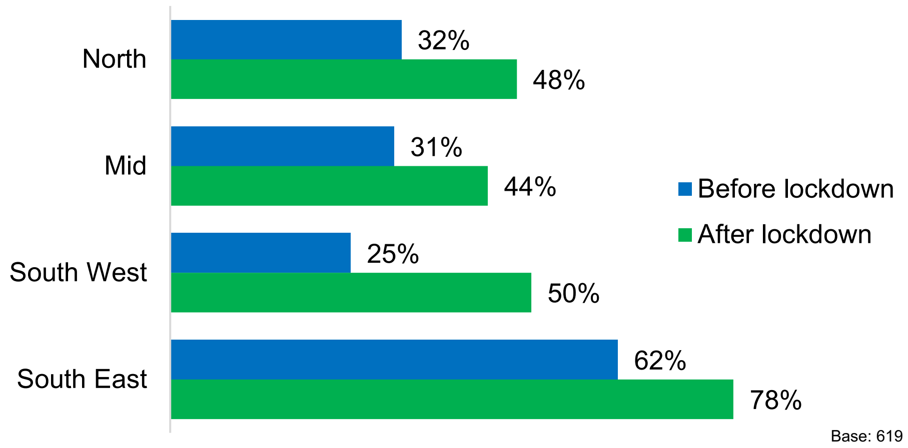
Q19 "How many bookings do you have for October and November ... ?"



6.13 The relative picture by region is similar to performance since reopening: prospects are best in South West Wales and worst in South East Wales.

"We're booked until the end of October instead of our usual one or two October bookings"
Self catering, South West

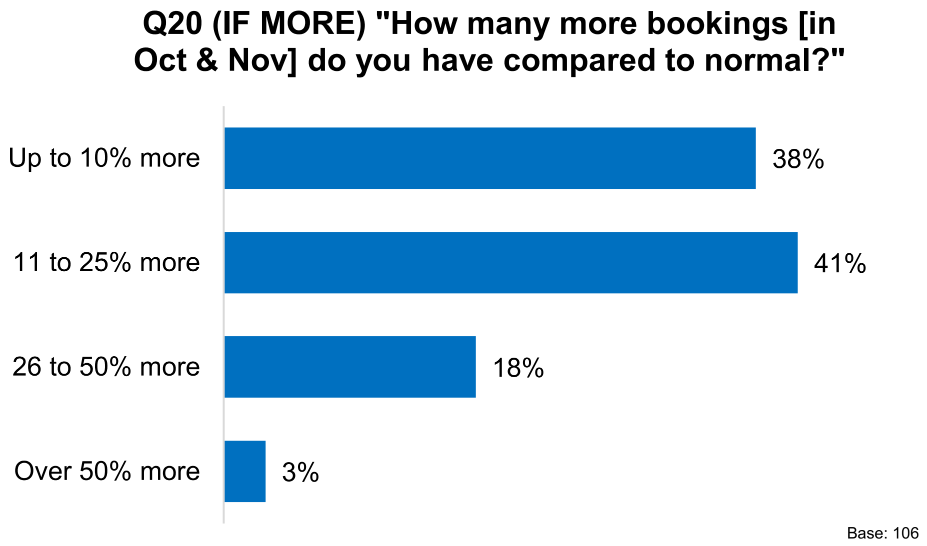
Q19 "How many bookings do you have for October and November ... ?" ('*Fewer than normal*' before and after lockdown)



6.14 As noted previously, the restrictions for Blaenau Gwent, Bridgend, Merthyr Tydfil and Newport also affected businesses who were not in lockdown at that point. In fact, South West Wales appears to have been hardest hit. A quarter of businesses interviewed before this lockdown said they have fewer bookings than normal for October and November, compared to 50% of businesses interviewed after this lockdown.

6.15 However, the highest proportion of businesses reporting fewer customers than normal after this lockdown was still highest in South East Wales (78%).

Scale of increased bookings at the time of survey



Q20 has been asked to businesses having more bookings than normal

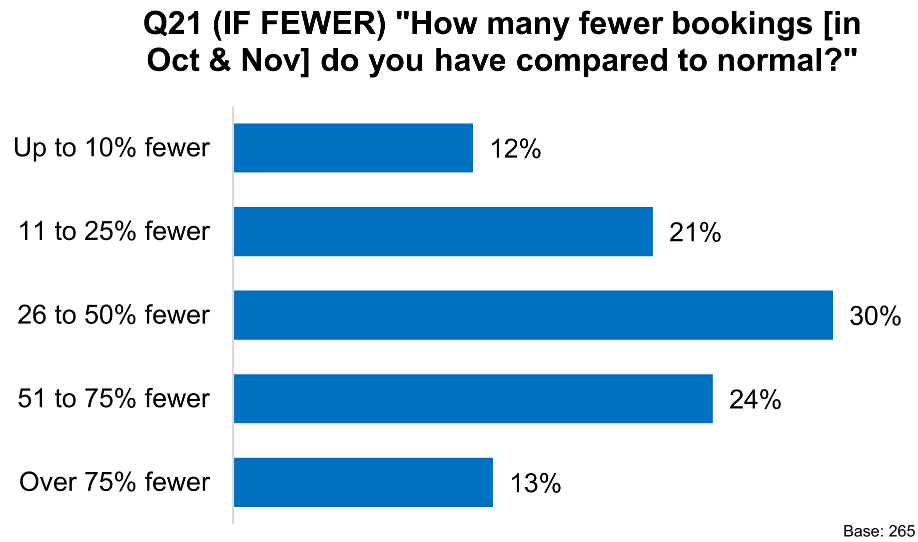
Busy period for some if bookings can still be fulfilled

6.16 At the time of interviewing, some operators said they were seeing an extension to their normal busy season as demand for staycations was high.

> *"We don't usually open in November but we've just been given permission to do so this year, so we're expecting to have similar full bookings to October"*
> Hostel, North

6.17 As more areas of Wales and the UK went into lockdown, it is unlikely that October and November will be fulfilled to the same extent. Earlier analysis of the effect of further lockdowns suggests that the above results could now be very different.

Scale of decreased bookings



Q21 has been asked to open businesses receiving fewer bookings than normal

Some businesses are well down on normal

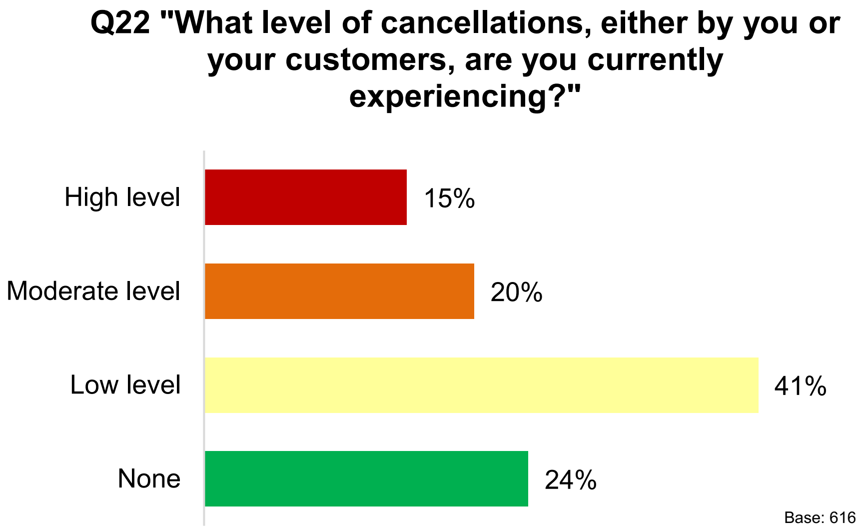
6.18 At the time of interviewing, 37% of businesses experiencing a decrease in bookings compared to normal for October and November had below half of their normal booking level. Among all businesses taking bookings for October and November, about one in six (16%) had below half of their normal booking level.

6.19 The sector struggling the most was activity providers – 44% of those taking bookings for Oct & Nov had below half their normal level. This is linked to operating capacity and in some cases, reliance on school trips.

"The business feels a bit dormant at the moment and I have had to take up a second job to be able to keep things going"
Activity provider, North

"We've lost 90% of our income"
Activity provider, South West

Cancelling bookings



The base for Q22 is businesses which are open / plan to reopen, and take bookings

Turbulent times for some

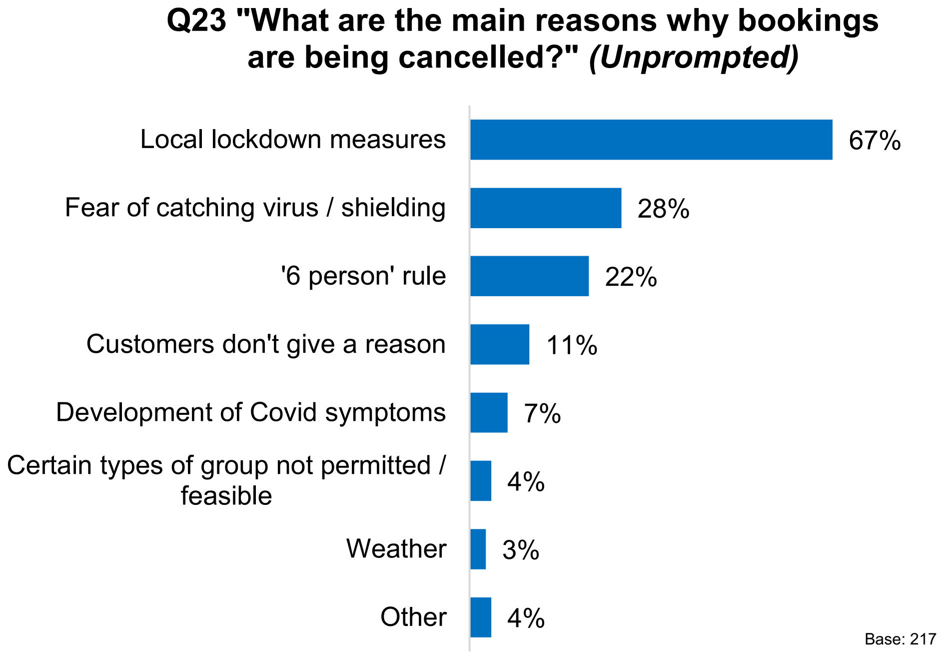
6.20 The evolving nature of the pandemic and restrictions introduced at short notice means that some operators are experiencing high or moderate levels of cancellations – either from them cancelling on their customers, or their customers cancelling on them.

6.21 The highest proportion of businesses experiencing a 'high level' of cancellations is in South East Wales (28%). The other regions do not differ significantly from each other. At the time of interviewing, 15% of businesses said they were experiencing a 'high level' of cancellations. However, this figure is different for businesses interviewed before and businesses interviewed after the lockdowns for Blaenau Gwent, Bridgend, Merthyr Tydfil and Newport. Of those interviewed before this lockdown, 10% reported a 'high level' of cancellations, whilst 30% said they had no cancellations. Of those interviewed after this lockdown, a higher proportion (21%) reported a high level of cancellations and a lower proportion (17%) said they had no cancellations.

6.22 South West Wales once again appears to have been hardest hit by this lockdown. Only 4% of businesses from this area interviewed before this lockdown reported a high level of cancellations, compared to 32% after. The impact of these lockdowns on businesses in South East Wales was less severe, with 29% reporting a high level of cancellations before the lockdown and 28% after, although those reporting 'no cancellations' decreased from 29% to 18%.

6.23 North Wales and Mid Wales also reported a higher level of cancellations after these lockdowns, with 'high levels' of cancellations in North Wales increasing from 11% to 16%, and Mid Wales from 4% to 13%.

Reasons for cancellations



Q23 has been asked to operators experiencing a high or moderate level of cancellations

Local lockdown

6.24 The first local authority in Wales to go back into lockdown was Caerphilly on 8 September. Many other areas in Wales have followed since. This is the main reason for high or moderate levels of cancellation.

"I've just had a couple of cancellations because of the lockdowns in Caerphilly and Rhondda Cynon Taff. I expect more to come, as it makes people nervous."
Serviced, Mid

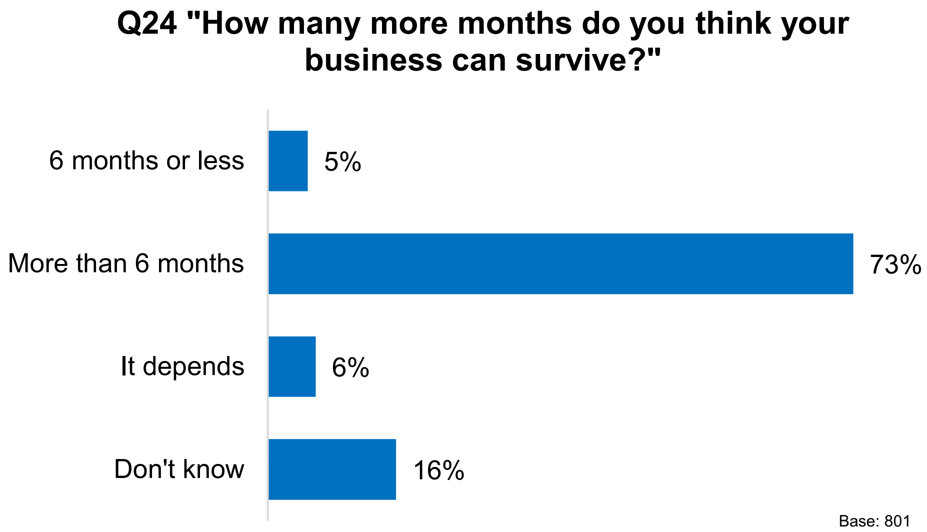
What are the rules in Wales?

6.25 New local lockdowns in some areas of Wales have added to the confusion of some English visitors, when differences in rules between England and Wales were already not well understood.

"A lot of our customers come from England and it seems that they are never aware of the restrictions in Wales. They have to actively search for information about Welsh guidelines so it would be helpful if they were better informed somehow."
Self catering, North

"It's unclear whether people can visit us because there's a lot of confusion around travel in Wales"
Self catering, North

7. Survival and Support Required



Survival outlook

7.1 Most (73%) businesses interviewed expect to survive for longer than the next six months. Some operators do not depend on tourism as their main source of income, and for many of those who do, being able to reopen in time for the main summer season saved them.

Differences by sector

Expected length of business survival	Sector						
	Serviced acc'm	Self catering	Caravan / campsites	Hostels	Attractions	Activity providers	Rest'rnt / pubs / cafes
Up to 6 months	6%	3%	-	11%	9%	7%	5%
More than 6 months	66%	82%	86%	73%	64%	64%	62%
It depends	10%	5%	-	4%	3%	10%	11%
Don't know	18%	10%	14%	12%	24%	19%	22%
Base:	*271*	*264*	*83*	*26*	*78*	*42*	*37*

7.2 The self catering sector has performed very well since reopening and so most businesses should survive the next six months.

7.3 Caravan & campsites are used to either being closed or having few customers in the winter anyway.

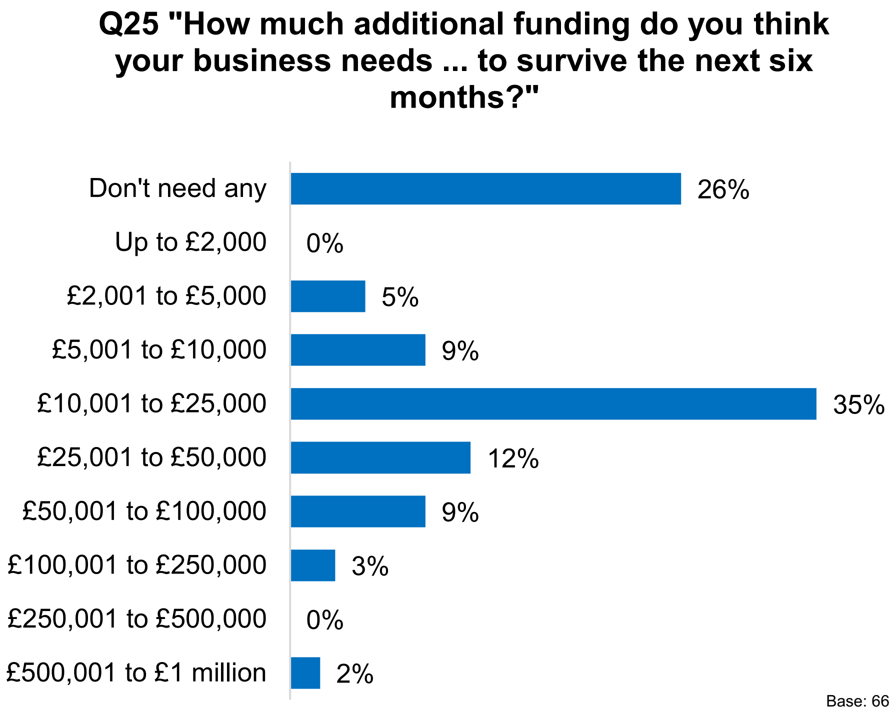
“We close October time so we're used to being closed throughout winter. Just hope next year is better.”
Caravan park, South East

7.4 The outlook for the other sectors is less certain. For every sector outside of self catering and caravan & campsites around a third either said that they won’t survive the next six months, it depends or they don’t know how long they can survive.

“I feel we only have a few months left if we go into another lockdown. We need to be keeping on as we are in order to survive the next few months.”
Pub, South West

“We rely on school bookings this time of year and they have all cancelled so we could survive till Christmas but after that we would have to temporarily close”
Hostel, North

Additional funding needed



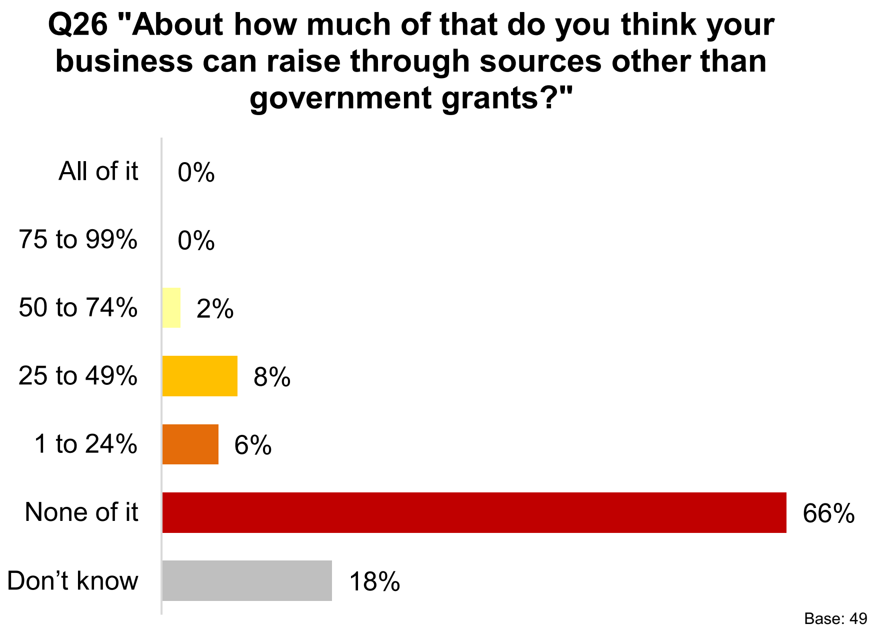
Q25 has not been asked to businesses expecting to survive for longer than the next six months. Only 30% of those being asked the question have offered an answer.

Not vast sums needed for many

7.5 The sums of money being talked about to keep the more vulnerable businesses going for the next six months are mostly not vast. Some say they don’t need any help, and among those who do, the most frequent answer is in the £10,001 to £25,000 range. Although around 9 of the 66 companies responding to this question needed between £50,001 and £1m.

7.6 Question 25 has a small sample size and, therefore, an element of caution needs to be applied when interpreting these findings.

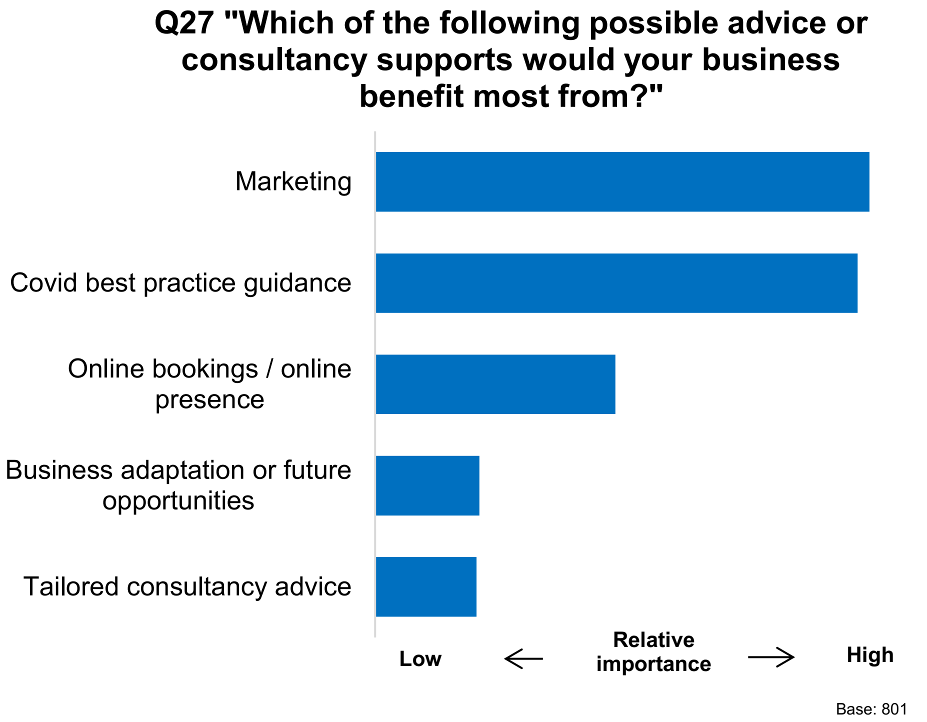
Alternative sources to explore



Some of the funding needed can be found through other sources

7.7 While operators are always likely to prefer grants because they don't have to be paid back and come at no risk to themselves, some say that a portion of the additional funding required can be found through other sources such as banks or personal finance. On average, about 6% of the amount needed could be found elsewhere.

Non-financial support



Respondents have been asked to name up to three supports in order of importance. We have produced a score for each factor by awarding 3 points for each 1st place, 2 points for each 2nd place, and 1 point for each 3rd place. The individual total scores do not mean anything in isolation – rather how they compare to each other relatively. The chart shows the relative importance of the supports.

Marketing and Covid best practice are the two most desired supports

7.8 When asked to prioritise potential non-financial supports, every sector and region ranks marketing and Covid best practice as the top two.

"We want to do our own website, so help with marketing would be useful"
Self catering, South West

"Marketing and online help would be appreciated. It's so different from when I started in the business fifty years ago."
Self catering, South West

Some show their appreciation of support already given

7.9 Some operators praise Visit Wales / Welsh Government or their local authority for support they have already received.

"We're really amazed by all the help we've been getting from the local council and Visit Wales"
Caravan park, Mid

“I think the small business grant scheme by the Welsh Government was extremely helpful and positive as it not only bridged the gap and allowed us to pull through Covid-19, but it also allowed me to bring forward maintenance. This made it more flexible for me as otherwise I would've needed to be open during winter in order to do maintenance.”
Self catering, South East

“Visit Wales seem to really care about our businesses and it's nice that they're making the effort. The newsletter is very helpful.”
Self catering, North

Wales Tourism Business Barometer 2020: Covid-19 Impact Wave 5

Sector Which of the following best describes your business?

- Serviced accommodation ❑
- Self catering ❑
- Caravan / campsite ❑
- Hostel ❑
- Museum ❑
- Attraction ❑
- Activity operator ❑
- Restaurant / pub / cafe ❑

Q1 Which of the following best describes the current situation of your business / attraction?

- We are open ❑
- We are closed – but plan to open later this year ❑
- We are closed – and do not plan to open (again) this year ❑

Q2 *If not open*

What is the main reason you are not open currently?

Prompt if necessary

- Covid-19 restrictions prevent my sector from being open ❑
- It would not be financially viable to open under current distancing guidelines ❑
- Staff shortages / illness ❑
- Temporarily closed the business ❑
- Permanently closed the business ❑
- Other ❑

Please specify other reason ________________

Q3 *If open*

At roughly what percentage of your normal capacity level are you currently operating?

- Open at full capacity ❑
- 90 – 99% ❑
- 80 – 89% ❑
- 70 – 79% ❑
- 60 – 69% ❑
- 50 – 59% ❑
- 40 – 49% ❑
- 30 – 39% ❑
- 20 – 29% ❑
- 10 – 19% ❑
- Less than 10% ❑

Q4 How many permanent paid staff does your business currently employ, excluding the proprietors?

- None ❑
- 1 ❑
- 2 ❑
- 3 ❑
- 4 ❑
- 5 ❑
- 6 to 10 ❑
- 11 to 50 ❑
- 51 to 100 ❑
- 101 to 250 ❑
- More than 250 ❑

Q5 *If staff*

What impacts is your business experiencing in relation to staff because of Covid-19?

Tick all that apply

- Have had to furlough staff ❑
- Have had to reduce staff hours ❑
- Haven't taken on / have taken on fewer seasonal workers ❑
- Have had to make redundancies ❑
- Have issued notice of redundancy to staff or are intending to make staff redundant following a consultation period ❑
- Anticipating having to make staff redundant in the future ❑
- No impact ❑
- Other impact ❑

How many people do you currently have on furlough? ____________

(Other) Please specify other impact ____________

Q6 *If have reduced hours*

For how many of the following types of staff have you had to reduce hours?

Full time permanent staff ____________

Part time permanent staff ____________

Q7 *If have made redundancies*

How many of the following types of staff have you had to make redundant?

Full time permanent staff ____________

Part time permanent staff ____________

Q8 Considering the redundancies you have made, what is the approximate difference this makes to your monthly staff costs?

Monthly amount saved **(£)** ____________

Q9 *If part time redundancies*

What is the full time equivalent of the part time redundancies?

E.g. 2 people who were each working 50% of full time hours would equal 1 full time equivalent person

No. of full time equivalent people ________________

Q10 *If have issued notice of redundancy or are in redundancy consultation with staff*

How many staff have been issued with notice of redundancy or are you planning to make redundant?

Full time permanent staff ________________
Part time permanent staff ________________

Q11 Considering the redundancies you have planning, what is the approximate difference this will make to your monthly staff costs?

Monthly amount to be saved **(£)** ________________

Q12 *If part time redundancies planned*

What is the full time equivalent of the part time redundancies planned?

E.g. 2 people who were each working 50% of full time hours would equal 1 full time equivalent person

No. of full time equivalent people ________________

Q13 In which month do you expect redundancies might happen?

- September ❑
- October ❑
- Later than October ❑
- Don't know ❑
- Prefer not to say ❑

Q14 *If future redundancies expected*

How many of the following types of staff do you anticipate needing to make redundant in the future?

Full time permanent staff ________________
Part time permanent staff ________________

Q15 In which month do you expect redundancies could happen?

- September ❑
- October ❑
- November ❑
- December ❑
- Later than December ❑
- Don't know ❑
- Prefer not to say ❑

Q16 Would you mind giving us an indication of how much revenue your business has lost so far due to the Covid-19 crisis?

- Haven't lost any revenue ❑
- Up to £1,000 ❑
- £1,001 - £2,500 ❑
- £2,501 - £5,000 ❑
- £5,001 - £10,000 ❑
- £10,001 - £25,000 ❑
- £25,001 - £50,000 ❑
- £50,001 - £100,000 ❑
- £100,001 - £250,000 ❑
- £250,001 - £500,000 ❑
- £500,001 - £1,000,000 ❑
- More than £1,000,000 ❑
- Don't know ❑

Q17 And roughly what proportion of your normal annual revenue does that loss represent so far?

- 2% or less ❑
- 3 - 5% ❑
- 6 - 10% ❑
- 11 - 15% ❑
- 16 - 20% ❑
- 21 - 30% ❑
- 31 - 40% ❑
- 41 - 50% ❑
- 51 - 60% ❑
- 61 - 70% ❑
- 71 - 80% ❑
- Over 80% ❑
- Don't know ❑

Q18 *If currently open*

From the point at which you were able to open your business after lockdown, how many customers have you had compared to the levels you would normally expect over this period?

- More than normal ❑
- Same as normal ❑
- Fewer than normal ❑

Q19 *If open or will reopen in 2020*

How many bookings do you have for October and November compared to normal for the time of year?

- More than normal ❑
- Same as normal ❑
- Fewer than normal ❑
- Don't take bookings ❑

Q20 *If more than normal*

How many more bookings do you have compared to normal?

- Up to 10% more ❑
- 11 to 25% more ❑
- 26 to 50% more ❑
- Over 50% more ❑

Q21 *If fewer than normal*

How many fewer bookings do you have compared to normal?

- Up to 10% fewer ❑
- 11 to 25% fewer ❑
- 26 to 50% fewer ❑
- 50 to 75% fewer ❑
- Over 75% fewer ❑

Q22 *If open or will reopen in 2020*

What level of cancellations, either by you or your customers, are you currently experiencing?

Prompt if necessary

- High level of cancellations ❑
- Moderate level of cancellations ❑
- Low level of cancellations ❑
- No cancellations ❑
- Don’t take bookings ❑

Q23 *If high or moderate level of cancellations*

What are the main reasons why bookings are being cancelled?

Unprompted, tick all that apply

- Local lockdown measures ❑
- '6 person' rule ❑
- Customers can’t find accommodation ❑
- Development of Covid symptoms ❑
- Fear of catching the virus / still shielding ❑
- Certain types of group not yet permitted / feasible ❑
- Weather ❑
- Customers put off by lack of open facilities ❑
- Can no longer afford the trip ❑
- Overseas visitors unable to get here ❑
- Customers don't give a reason ❑
- Other ❑

Please specify other reason(s) ____________________

Q24 How many more months do you think your business can survive?

- Less than 1 month ❑
- 1 month ❑
- 2 months ❑
- 3 months ❑
- 4 months ❑
- 5 months ❑
- 6 months ❑
- More than 6 months ❑
- It all depends on certain factors ❑
- Don't know ❑

Q25 *If 6 months or less, or it depends*

How much additional funding do you think your business needs to find in order to survive the next six months?

- Don't need any ❑
- Up to £2,000 ❑
- £2,001 to £5,000 ❑
- £5,001 to £10,000 ❑
- £10,001 to £25,000 ❑
- £25,001 to £50,000 ❑
- £50,001 to £100,000 ❑
- £100,001 to £250,000 ❑
- £250,001 to £500,000 ❑
- £500,001 to 1 million ❑
- £1 to 2.5 million ❑
- £2.5 to 5 million ❑
- Over £5 million ❑
- Don't know / refused ❑

Q26 *If any amount answered above*

And about how much of that do you think your business can raise through sources other than government grants, e.g. through banks, personal finance etc?

- All of it ❑
- 75 to 99% ❑
- 50 to 74% ❑
- 25 to 49% ❑
- 1 to 24% ❑
- None of it ❑
- Don't know ❑

Q27 Which of the following possible advice or consultancy supports would your business benefit most from?

Interviewer: read out and ask them to rank up to three in order of importance by typing in '1' for the most important, then '2', '3'. Leave other options blank.

Marketing	________________
Online bookings / online presence	________________
COVID best practice guidance	________________
Business adaptation or future business opportunities	________________
Tailored consultancy advice for your business	________________