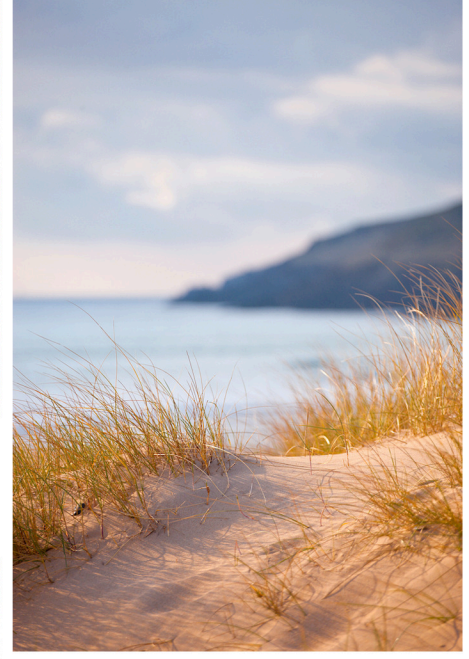
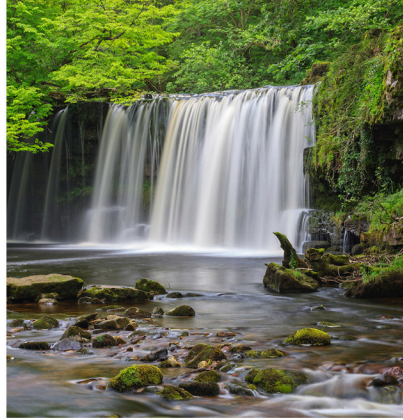


Wales Tourism Business Barometer 2021

Covid-19 Impact Wave 7 Report



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Wales Tourism Business Barometer 2021: Covid-19 Impact Wave 7 Report.

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

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1. **Headline Findings**

May half term performance relates to operating capacity

- 1.1 One in five (20%) operators open for May half term had more customers compared to in a normal year, about half (52%) had the same, and 28% had fewer.
- 1.2 Mixed performance is due to restricted capacity, not lack of demand. Nearly all (97%) businesses operating at full capacity received more or the same level of visitors compared to a 'normal' May half term. However, the majority (62%) of those operating at less than full capacity had fewer visitors than normal.

Peak summer is booking up

- 1.3 About two in five (41%) businesses taking advance bookings in 2021 have more than normal at this point in the year, and 36% have the same level. The most promising sectors are those more self-contained and therefore able to operate at fuller capacity: caravan parks (58% have more advance bookings than normal) and self catering (48%).
- 1.4 Among the regions, capacity is filling up fastest in south west Wales – 55% have more advance bookings than normal at this time of year.
- 1.5 For the month of August, available self catering capacity is on average 90% booked per operator, but currently much lower (60%) among serviced accommodation.

Flurry of booking, cancelling and rebooking activity

- 1.6 Any bookings are potentially fragile, but there is currently so much demand for long UK staycations that filling cancellations is not difficult. Whether or not the industry will enjoy a prosperous summer may well depend on (a) operating capacity and (b) whether any significant changes are made to overseas travel rules before peak summer.

Can't get the staff

- 1.7 22% of businesses are currently trying to fill vacancies. About half (51%) of them are experiencing 'considerable' difficulty in doing so. It seems that furlough has given many workers time to reflect on how much they really still want a job in the tourism industry, which many now see as not worthwhile because of low pay, antisocial hours or job insecurity.

Reasonable level of confidence

- 1.8 27% of operators are 'very confident' about running a tourism business profitably for the remainder of the year, and a further 42% are 'fairly confident'. The main factor is that they need to stay open.

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 seventh wave to research the impact of the Covid-19 pandemic on the tourism industry.

How was the Survey conducted?

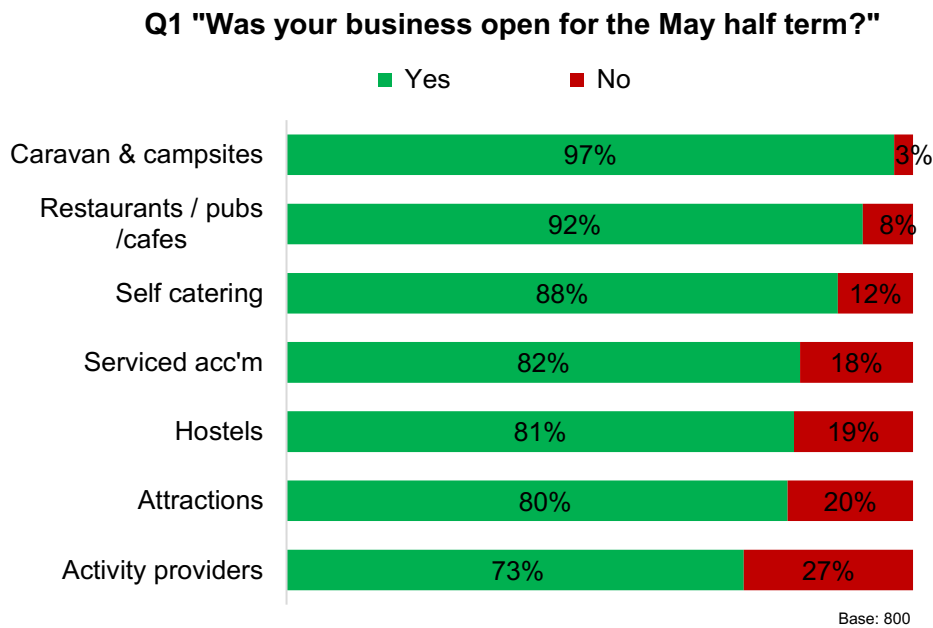
- 2.3 We have conducted 800 interviews by telephone. This makes results of questions asked to everyone accurate to $\pm 3.5\%$. The sample is broadly reflective of the tourism industry in Wales and is shown below by sector and region:

Sector / Region	North	Mid	South West	South East	Total
Serviced accommodation	111	39	88	36	274
Self-catering	64	47	90	32	233
Caravan / campsites	62	16	20	12	110
Hostels	8	6	7	5	26
Attractions	24	18	17	22	81
Activity operators	16	7	12	5	40
Restaurants / pubs / cafes	6	12	7	11	36
Total	291	145	241	123	800

- 2.4 75% 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.
- 2.5 All telephone interviews have been conducted with business owners or managers between 8th and 17th June.

3. May Half Term Performance

Open for half term



Tourism is back

3.1 Following long periods of closure and uncertainty, the Welsh tourism industry is open for business again. Most (86%) businesses were open for the recent May half term.

Some sectors still facing reopening challenges

3.2 Some activity providers are still unable to open because of the continued loss of their key market (school trips) or complications with distancing.

"Outdoor educational residential visits are still not allowed in Wales so after 20 years, I had to get a job as a delivery driver and close the activities side of the business."
Activity provider, North

"We're not taking people out diving on courses. I couldn't watch someone struggling with the kit and stay two metres apart."
Activity provider, North

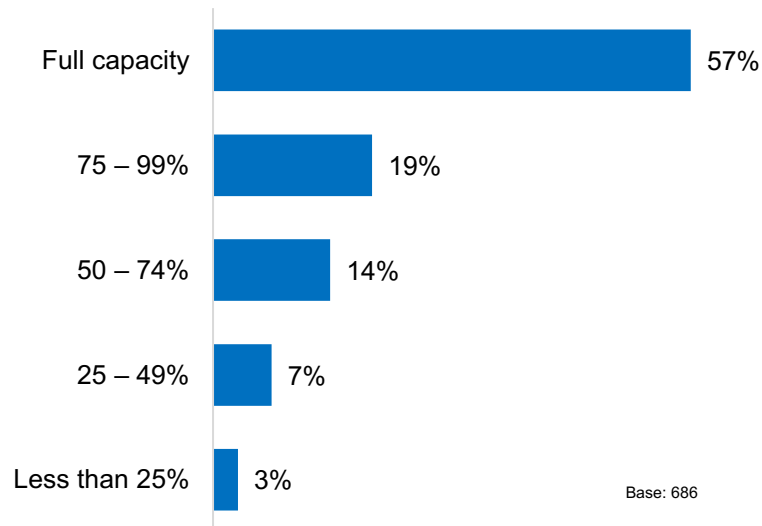
3.3 Some attractions have not yet reopened because they are not fully commercial enterprises and so are not under the same pressure as private sector operators. There are plans to reopen, but just not necessarily with the same urgency. Some indoor attractions are also too challenged by the prospect of operating with social distancing.

"We are a charity so we don't have to be concerned about profit"
Attraction, South East

"We'd love to have visitors back in but we can't even open our charity shop or indoor cafe, let alone the indoor activities. We're a registered charity, run by volunteers."
Attraction, Mid

Operating capacity

Q2 "At what level of normal capacity were you operating?"

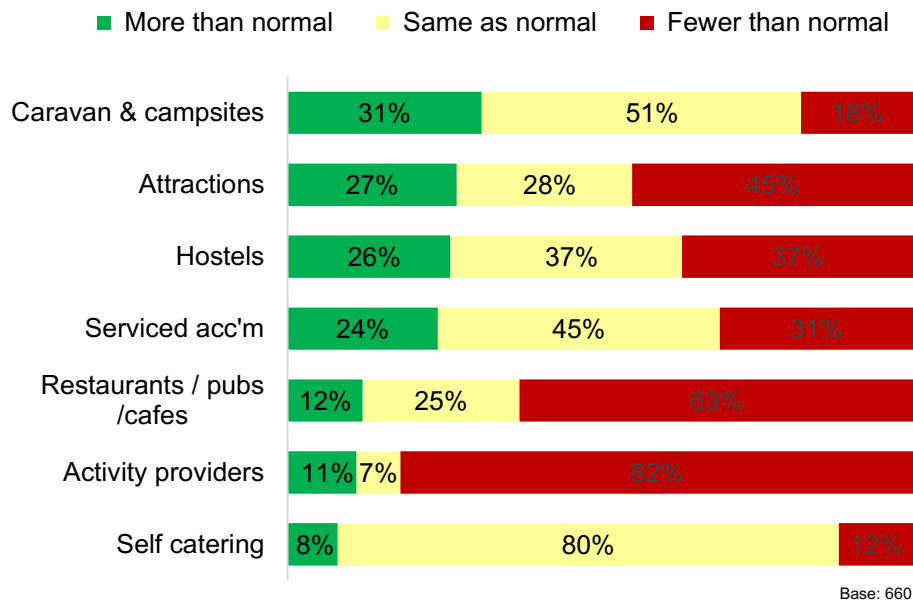


Operating capacity and the effects on customer volumes

- 3.4 Slightly over half (57%) of businesses open during May half term were operating at full capacity, but findings vary by sector – the more naturally self-contained the guests, the higher the capacity. Four in five (80%) self catering operators and three in five (60%) caravan parks could operate at full capacity. At the other end of the scale, about half (51%) of open activity providers were operating at less than half of normal capacity.
- 3.5 These findings are important context for the results of the following question.

May half term visitor volumes

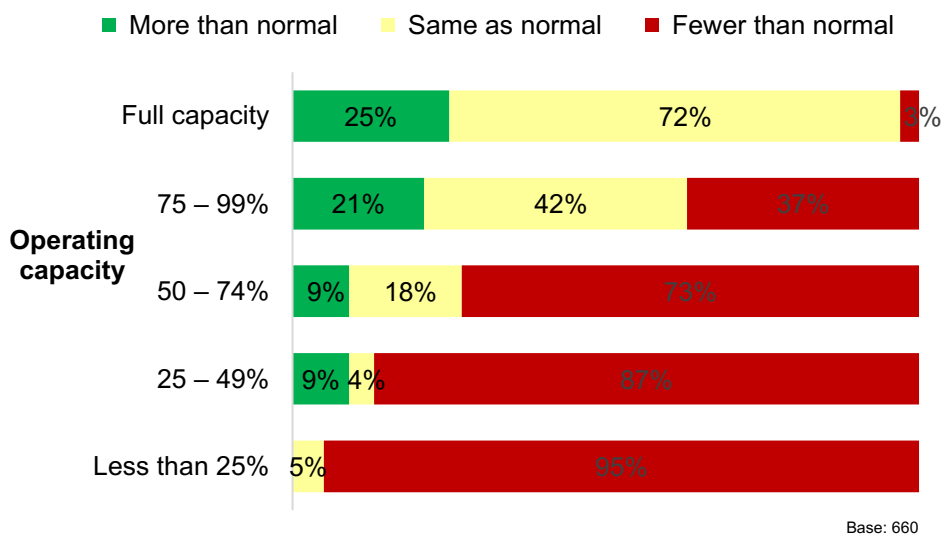
Q3 "How many customers did you have during May half term compared to in a normal year?"



Performance correlates strongly with operating capacity

3.6 Overall, one five (20%) operators open for May half term had more customers compared to a normal year, about half (52%) had the same, and 28% had fewer. The proportions busier than normal do not vary significantly by region. The following chart shows how the results of Q3 correlate strongly with operating capacity (Q2):

Q3 "How many customers did you have during May half term compared to in a normal year?"



Busy time for caravan parks

- 3.7 Caravan parks enjoyed a busy half term. Being able to operate at a good level of capacity meant they could take advantage of high domestic demand.

“People are booking like crazy. We have never had so many people booking. We have been buying caravans and they're being sold before they even get delivered on the site.”

Caravan park, Mid

Normal volumes in self catering accommodation

- 3.8 Most (80%) self catering operators report the same volume of guests as normal for May half term. This was partly influenced by large volumes of rebookings from previous Covid-related cancellations.

“We're still accommodating last year's postponements from our regulars”

Self catering, Mid

Challenges experienced by activity providers and restaurants / pubs / cafes

- 3.9 Most activity providers had fewer customers than normal, and this is linked to operating capacity rather than lack of demand, with around half only being able to operate at less than 50% of normal capacity. The picture is similar for restaurants, pubs & cafes.

“We can only take one group or couple on the boat at a time but there are a lot of tourists around at the moment so the bookings are coming in”

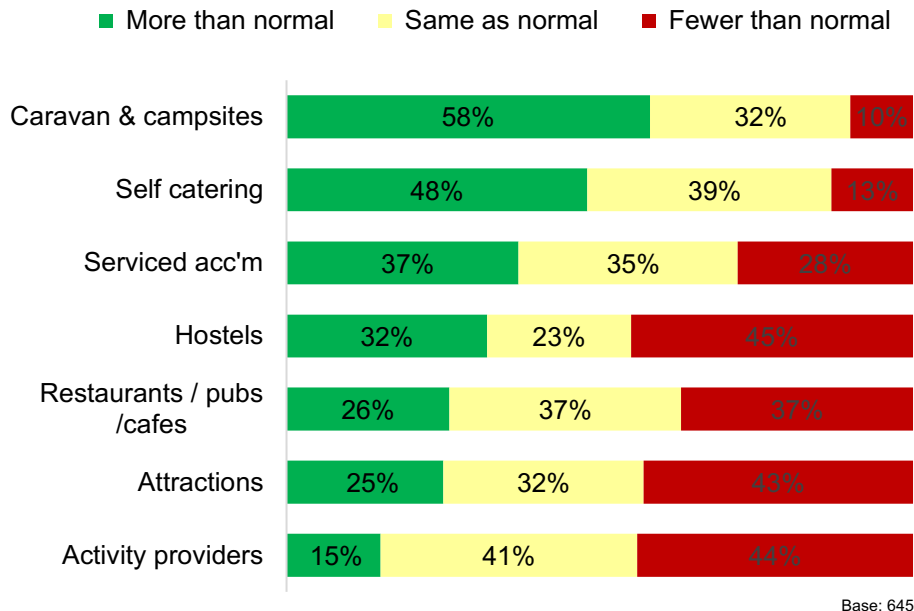
Activity provider, North

“Fewer bookings than we normally can take because of restricted capacity”

Pub, South East

4. Advance Bookings

Q5 "How many advance bookings do you have for the remainder of 2021 compared to what you would normally have at this point in the year?"



Q5 has been asked to businesses taking advance bookings in 2021

Good prospects for accommodation providers

- 4.1 Most (91%) businesses are currently taking bookings in 2021. Among those which are, 41% have more advance bookings than normal at this point in the year, 36% have the same level, and 23% have fewer.
- 4.2 Results for accommodation operators are more promising than for non-accommodation operators at this stage, especially in sectors which are more self-contained.

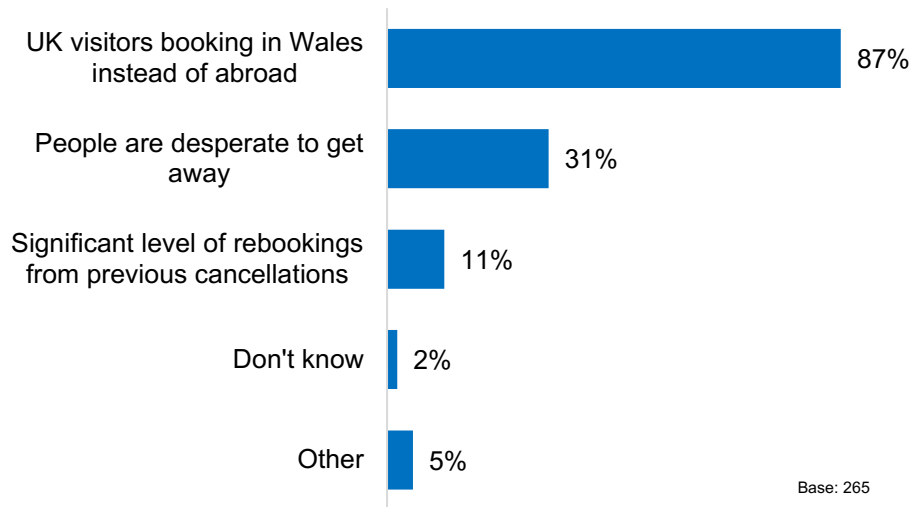
"People are booking up the summer earlier than usual"
Caravan park, North

Variation by sector – looking good for south west Wales

- 4.3 The proportions seeing more advance bookings than normal at this time of year vary by region:
- South West (55%)
 - North (41%)
 - Mid (33%)
 - South East (23%)

Reasons for more advance bookings

Q7 "Why do you think you have more advance bookings than normal?" (Unprompted)



Booming demand for staycations

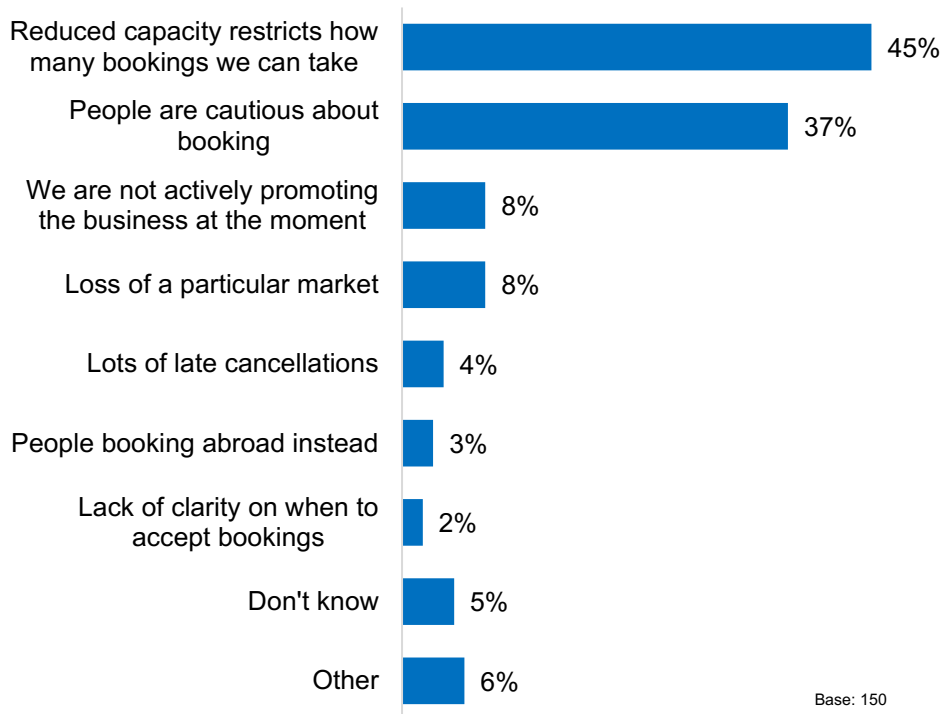
4.4 With much continued uncertainty over when overseas holidays can be taken without quarantining and to which countries, UK holidaymakers are booking staycations. This combined with much desperation to get away after being locked down is resulting in a flurry of booking activity in Wales. For some operators, the UK guests are making up for the lack of normal overseas guests.

"All my bookings are British people. I usually have a lot of Germans, Americans and Canadians."
Serviced, South West

"It's crazy. We're already full for June, July, August and September ... People would normally come to Tenby for two, three or four nights but are coming for five, six or seven nights because they can't go abroad."
Serviced, South West

Reasons for fewer bookings

Q6 "Why do you think you have fewer advance bookings than normal?" (Unprompted)



Unable to take advantage of high demand

- 4.5 Some operators are unable to benefit fully from booming domestic demand because their capacity restrictions don't allow it.

"There are more tourists in the area and we're having to turn people away because there's no capacity"
Caravan park, North

Cautious behaviour among some holidaymakers

- 4.6 Some businesses say that while they are seeing high demand, the enquiries are coming in last minute rather than far in advance. Reasons for cautious booking behaviour include waiting on the weather forecast and for changes in Covid rules.

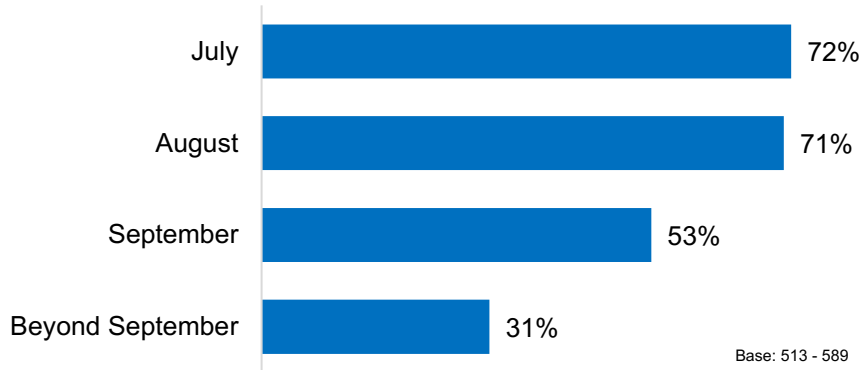
"I think people are holding off booking recently, waiting for updates on what Boris [Johnson] and the First Minister will say"
Caravan park, North

"Lots of last minute bookings"
Hostel, North

Booked available capacity by month

Q8 "Approximately what percentage of your available capacity is booked for ... ? By 'available capacity' we mean the capacity level you're assuming you can operate at."

Approx. booked occupancy levels shown

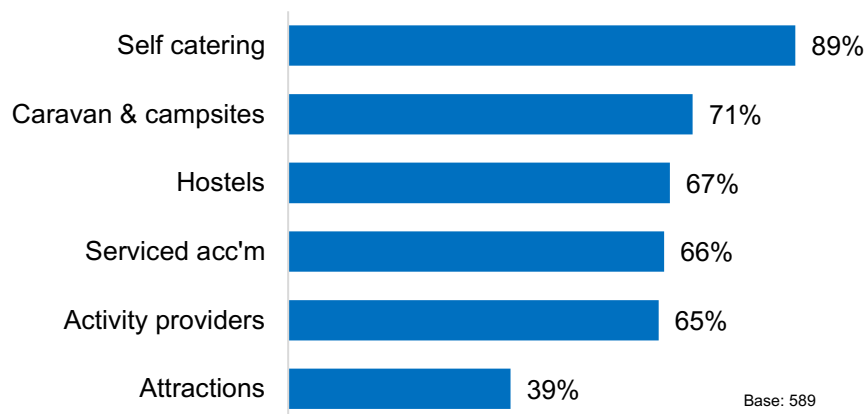


Q8 has been asked to businesses taking bookings in 2021. 'Don't know' and 'not applicable' answers have been excluded from the results.

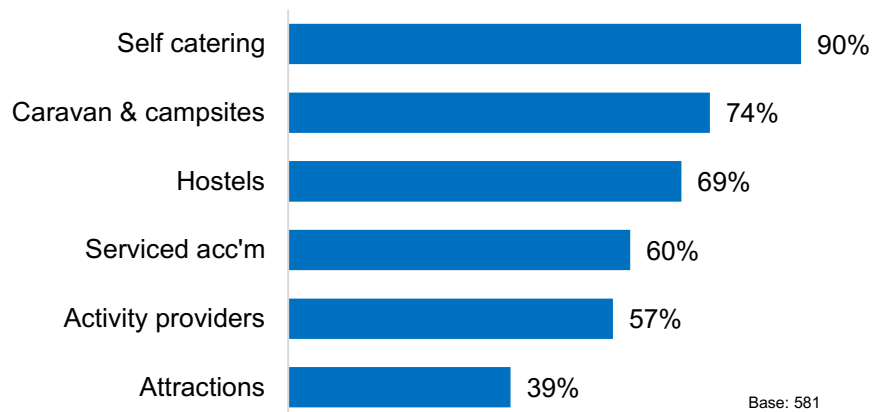
Promising advance bookings levels for the summer

4.7 Much available capacity is already booked up for July and August. However, it is not impossible for anyone still seeking a summer holiday in Wales to find a bed because many accommodation operators are not yet fully booked. The charts below show more detail by sector for the summer:

Average booked occupancy for July



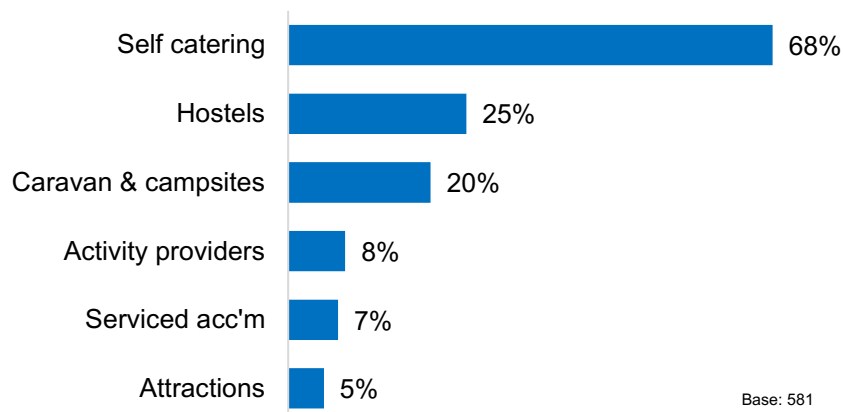
Average booked occupancy for August



Self catering booking up fastest

- 4.8 In both July and August, self catering is the hardest accommodation to find. In August, operators have on average 90% of their available capacity booked.
- 4.9 Other non-serviced accommodation is generally more booked up than serviced accommodation, which has an average of 60% of available capacity booked for August.
- 4.10 Differences between sectors can also be seen clearly by comparing the proportion of businesses fully booked for August:

% of operators fully booked for August



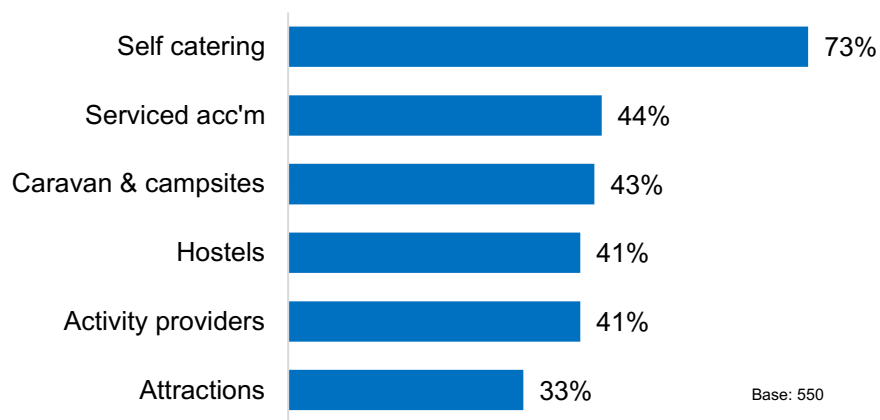
Differences by region for August

4.11 South East Wales is not yet seeing the high advance booking levels that the other regions of Wales are enjoying. Average available capacity booked for August by region is:

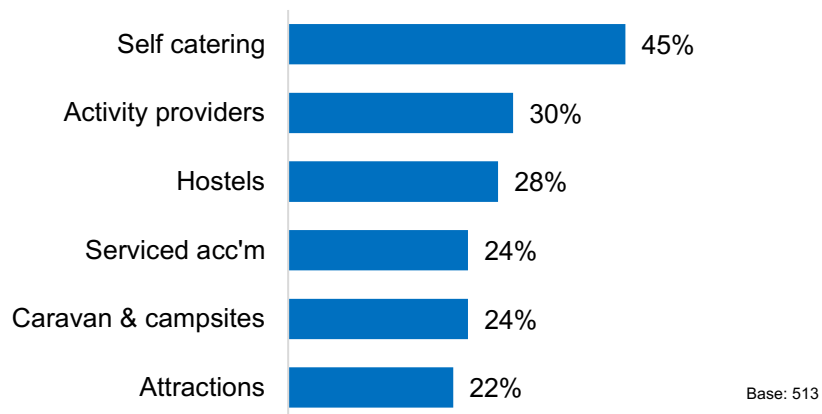
- South West (77%)
- North (74%)
- Mid (67%)
- South East (49%)

Advance bookings for the autumn

Average booked occupancy for September



Average booked occupancy beyond September



4.12 Advance bookings for September are fairly substantial, especially in self catering again, but beyond September some operators comment that they have a noticeable 'drop-off'. We cover this next under 'Open comments on booking trends'.

Open comments on booking trends

- 4.13 Open comments show that in spite of advance booking data, it is quite hard to predict at this stage how the industry is going to fare this summer.

Flurry of activity going on behind the scenes

- 4.14 As we approach peak summer, operators are very busy dealing with enquiries, bookings, cancellations and rebookings. Comments are very mixed on whether the current trend is to book in advance or last minute – it seems to be a combination of both. Some bookings get made well in advance, then get cancelled, only for the space to be snapped up again by someone else.

“Even when people cancel, it becomes rebooked straight away by someone else”
Self catering, North

“If we get a cancellation, it's booked again in ten minutes or half an hour at the most”
Serviced, South West

- 4.15 Unless there is a significant change in travel rules to popular overseas destinations soon, from comments it seems the most likely scenario for tourism to Wales this summer is that occupancy of available capacity will be high. This is because there are so many enquiries coming in, that even if some advance bookings get cancelled last minute, there is enough demand to replace them.

“Normally people only book a week or two in advance but I've hardly got a room free between now and September. I've only ever had 25% of the enquiries that I'm getting at the moment. It's madness!”
Serviced, South West

“We're experiencing a lot of cancellations. They're cancelling straight away. They're going on booking.com, booking different hotels and then deciding which they want. The cancellations are filled quite quickly. We're holding off sending out confirmation emails now because the trend is that they're cancelling within a few hours.”
Serviced, South West

“We're getting a lot of cancellations. People panic book and then change their minds, for whatever reason. They get rebooked.”
Self catering, Mid

Longer stays

- 4.16 There is a clear trend towards longer stays. UK holidaymakers can't easily holiday abroad and so are booking what would normally be their main holiday in the UK instead.

4.17 Some of the trend towards longer stays is enforced by operators only allowing stays of a certain length. This is sometimes due to high demand, and sometimes because of extra cleaning required in between stays.

“People are booking for four, five nights and a week which is unheard of. We have started doing two night minimum stays because of the cleaning.”

Serviced, South West

“More people are booking week long stays rather than weekends”

Caravan park, South East

“People are booking longer stays. They're seeing us as their main holiday, as they can't go abroad.”

Serviced, South West

“A lot more longer (two week) stays”

Caravan park, North

Some comments about drop-off in bookings after September

4.18 Some operators feel that October onwards is looking noticeably quieter than usual and do not know the reasons why. Given the continued uncertainty over when holidays abroad will become more feasible again, it is difficult at this stage to predict how the industry will fare in the autumn. However, some comments show that currently this looks like a period which needs a boost.

“There seems to be a lack of bookings from autumn onwards”

Self catering, North

“We've experienced far more bookings in advance than we'd expect, but also we've not had a single booking for October yet, which is very unusual for us.”

Serviced, Mid

“We don't have many bookings past the middle of September”

Serviced, South West

5. Staffing Levels and Recruitment Issues

Furloughing staff

No. of permanent staff employed	Av. staff furloughed <i>(Base: all businesses which employ staff)</i>
1	0.2
2	0.1
3	0.1
4	0.5
5	0.3
6 – 10	1.2
11 – 50	2.9
Over 50	0.4
Overall	1.3

Base: 455

Not many staff left on furlough

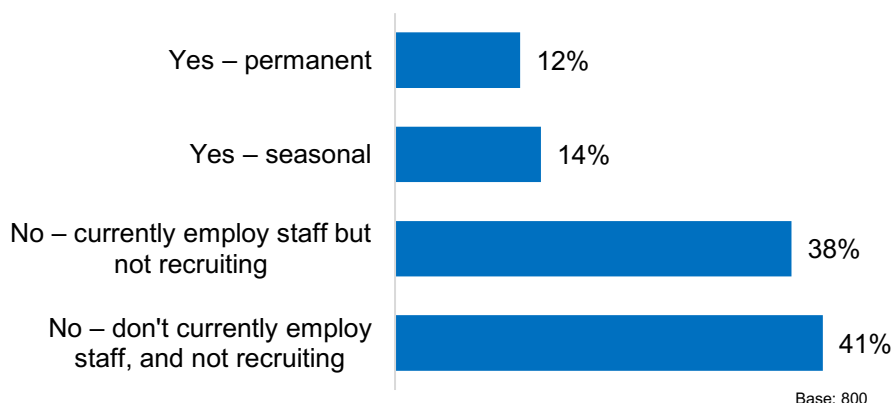
5.1 In February, 9.2 people per tourism business employing staff were on furlough. Now as the industry is mostly reopen, staff have been called back to work, leaving an average of just 1.3 furloughed workers per business employing staff. Whether or not employees actually want to return to work is a different matter, discussed later.

Seeking to fill vacancies

5.2 Slightly over half (57%) of businesses currently employ staff other than the proprietors, and the remaining 43% do not. Self catering businesses in particular are more likely not to employ staff – 72% do not.

5.3 As the Welsh tourism industry comprises a sizeable volume of solely owner-run businesses, this is important context when viewing the scale of recruitment issues.

Q13 "Are you currently trying to fill any staff vacancies, whether that's permanent or seasonal?"



Respondents could give more than one answer – hence the numbers add up to more than 100%

Some have vacancies

- 5.4 A minority of businesses are seeking to fill vacancies – this is partly because many businesses don't normally employ anyone other than the proprietors.
- 5.5 Among just businesses which currently employ staff, about one in five (21%) are seeking new permanent staff, and the same proportion (21%) are seeking new seasonal staff.

Number of staff sought

No. of permanent staff employed	Av. permanent vacancies <i>(Base: businesses with permanent vacancies)</i>	Av. seasonal vacancies <i>(Base: businesses with seasonal vacancies)</i>
0	<i>Sample too small</i>	2.2
1 – 3	1.5	2.5
4 – 5	1.9	2.2
6 – 10	2.0	2.5
11 – 50	4.1	4.3
Over 50	7.0	5.6
Overall	3.4	3.2

Base: 95 - 109

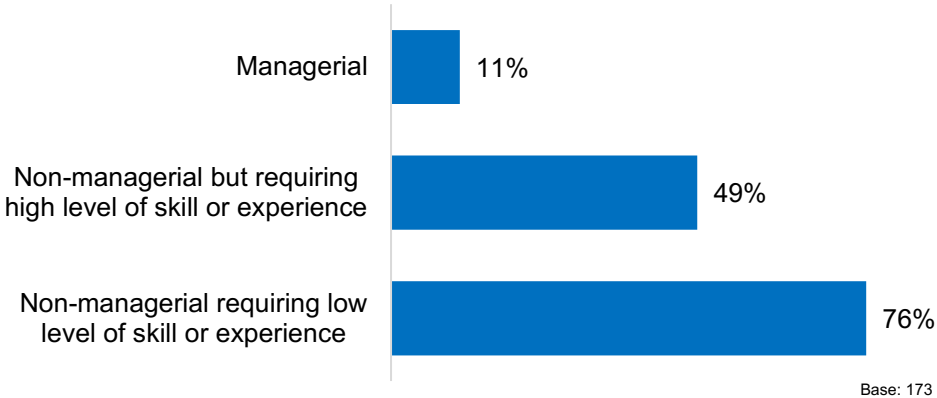
Smallest businesses have highest staff shortage in proportion to size

- 5.6 On average, there are 3.4 permanent vacancies and 3.2 seasonal vacancies per business seeking to fill those types of position. Vacancy figures increase with business size, but not in

proportion. It seems that businesses with the fewest employees have the most vacancies in relation to their current size.

Types of vacancy

Q15 "Which of the following positions and levels of experience are you currently trying to fill?"

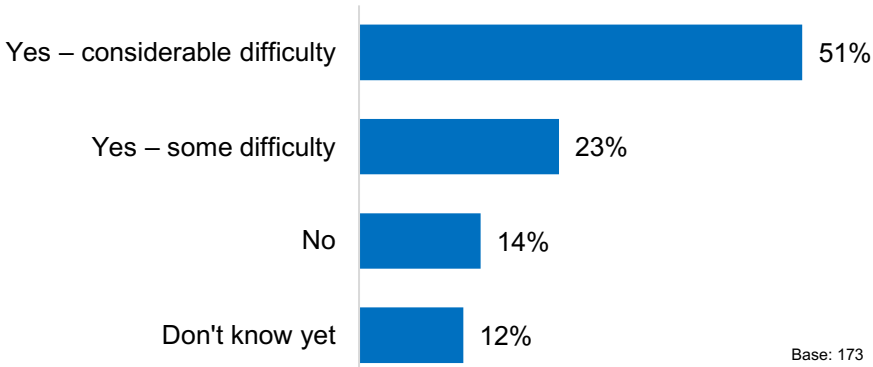


Mostly non-managerial employees sought

5.7 Most (76%) businesses with vacancies are looking to fill positions requiring a low level of skill or experience. The sample size is too small to break down reliably by sector.

Difficulties in recruitment

Q16 "Are you experiencing any difficulties in finding the staff you need?"

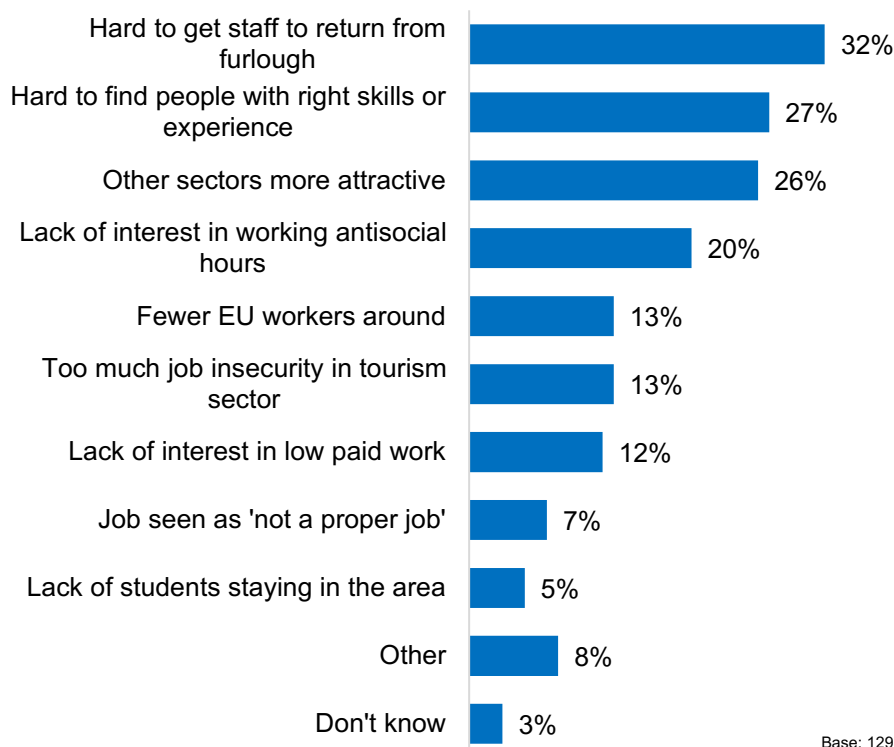


Hard to fill the vacancies

- 5.8 Operators with jobs on offer are not having an easy time finding suitable people to take them. There are numerous reasons for this, discussed next.
- 5.9 Differences between region and sector are hard to compare reliably because of very small individual sample sizes for this question, but the general picture is that recruitment is a struggle among those trying to recruit in all sectors and regions.

Reasons for recruitment difficulties

Q17 "Why do you think you're experiencing difficulties in finding the staff you need?"



Being on furlough has given workers time to reflect

- 5.10 The furlough scheme has undoubtedly saved many jobs last year and this, but unfortunately for the Welsh tourism industry, there is a knock-on challenge now that businesses need their staff back again.
- 5.11 Many of the reasons given essentially amount to the same challenge: many people do not see a job in tourism as particularly desirable. Other sectors – if people even want to work at all – are perceived as offering better pay, more desirable hours (less antisocial) or greater job

security. Now that many staff have had time to reflect on furlough, returning to their job in tourism no longer holds appeal.

“During furlough a lot of people realised they want to spend more time at home with their family so it is hard to get anyone to work full time”

Caravan park, North

“I struggled so much to find staff that I had to approach a sixth form tutor to find students to employ. People are too comfortable on benefits and a lot of people have money saved up from the lockdowns and don't need to work.”

Attraction, South East

“I think people went on furlough and gave other types of jobs a go, and now they don't want to return to hospitality”

Restaurant, Mid

“People don't want to risk taking jobs with us because we'll be one of the first places to shut if things get worse and lockdowns begin popping up in full force again”

Pub, South East

“Furlough has made the country lazy”

Serviced, South West

“The work-life balance in hospitality is terrible and lockdown has given people the chance to realise that”

Pub, South West

Loss of core pool

5.12 Whereas some businesses used to successfully find willing workers among certain groups of the local population such as overseas nationals and students, the lack of these people being around in the local area anymore has exacerbated recruitment difficulties.

“The local British people are not interested in working right now”

Serviced, North

“All the students have gone home or are studying at home and so we're having difficulty finding staff to cover the hours”

Serviced, Mid

Hard to find people with the right skills or experience

5.13 Sample sizes by sector are small, but results show indicatively that attractions & activity providers struggling to recruit say this is because it is hard to find people with the right skills or experience – 17 out of the 21 attractions & activity providers in the sample for this question say this.

“There are no instructors. There haven't been any instructors trained for two years now.”

Activity provider, Mid

Nonchalance among some applicants

5.14 It seems jobs in tourism are so easy to find at the moment for those who might want them, that some applicants offered an interview don't even bother to turn up.

"Loads of people apply but no-one turns up. Not one out of eight interviews for a chef turned up."

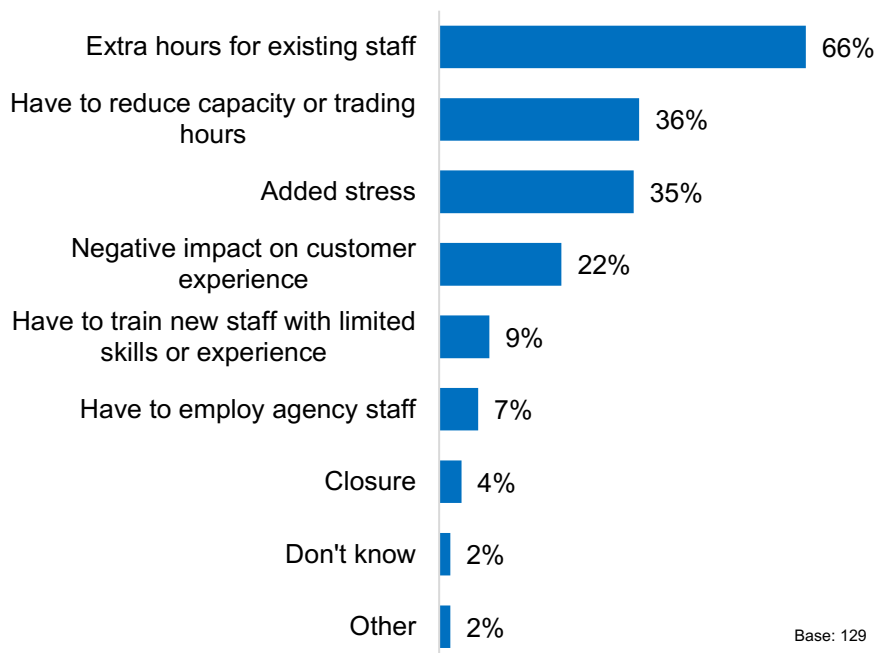
Serviced, South West

"The local Welsh applicants didn't even turn up for the interview, which left us only with the option of hiring international students"

Caravan park, North

Effects of recruitment difficulties

**Q18 "What impact would it have on your business if you're unable to find the right staff?"
(Unprompted)**



Current staff are very stretched

5.15 Among businesses struggling to fill vacancies, the effects of not filling them are significant. It commonly means extra hours for existing staff and/or the owners, which is alright if staff really need the extra pay, but not if they are stretched to the point of burning out.

"A lot of extra work for me and my daughter as we're open seven days a week"

Self catering, South West

“It would be horrible for the current staff here [if vacancies are not filled]. It would affect all of their working hours.”
Attraction, South West

“We're spread really thin. We're usually busy just for the summer but this is our best year ever and we're under-staffed.”
Self catering, Mid

“I'm the owner and I'm having to work in the kitchen at the moment”
Serviced, South West

Reduced capacity or trading hours

5.16 Rather than push themselves or their existing staff to burn-out, some owners have decided to reduce their capacity or trading hours.

“I'll restrict hours, rather than kill my staff with overtime. We're not trading lunchtimes during the week anymore.”
Serviced, North

“Lots of restaurants in the area are operating at reduced trading hours due to lack of staff. It will be the same for us if we're unable to find the right staff.”
Serviced, North

“We've had to turn away customers during peak hours because we don't have enough chefs to deal with them”
Restaurant, South East

When will our food be ready?

5.17 Some businesses fear that customer experience will be negatively affected if they can't fill the vacancies.

“People will have to wait longer for their food if we can't find catering staff. There are signs in the windows all over Tenby with catering positions.”
Attraction, South West

Is recruitment difficulty a long term problem?

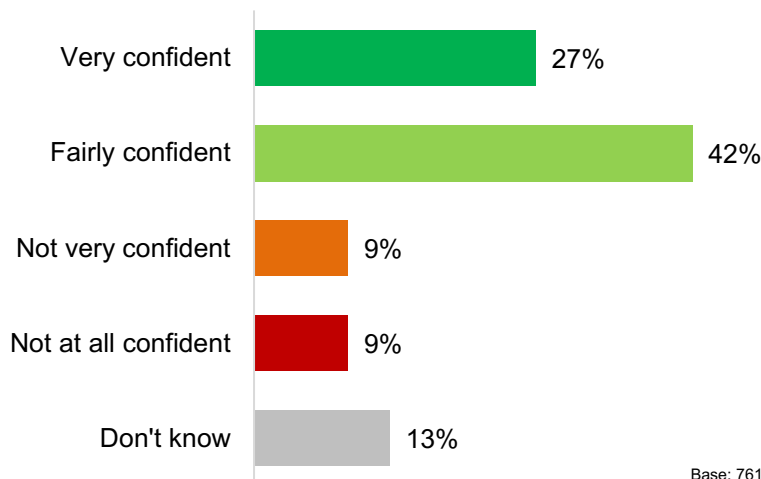
5.18 While there are many recruitment challenges right now, a few operators have commented that they believe the problem will be short-lived.

“Chefs have got other jobs delivering parcels for Amazon. They've realised that they don't have to work Saturday nights. I think they'll be back in a couple of months.”
Serviced, South West

“People don't want to return from furlough, but when winter comes, they will run out of money and look for work again.”
Restaurant, North

6. Confidence

Q10 "How confident do you feel about running a tourism business profitably for the remainder of this year?"



Base: 761

Reasonable level of confidence

- 6.1 After all the uncertainty and periods of closure during the past 15 months, the majority (69%) of operators are confident they can run their business profitably for the remainder of the year.
- 6.2 Confidence correlates with advance booking levels and operating capacity. At the confident end of the scale, 40% of self catering operators and 35% of businesses in south west Wales are 'very confident'. Advance booking levels are highest among these respondent groups, and self catering operators are best set up to operate at high capacity, making it easier to run profitably.
- 6.3 At the other end of the scale, 27% of activity operators are 'not at all confident'. This is where operating capacity is most challenged and advance bookings levels are weakest.

Businesses can now survive, as long as there is not another lockdown

- 6.4 The confidence to operate profitably to the end of the year is driven by the high level of enquiries and bookings – even if some of those bookings are cancelled or are not made until the last minute. Businesses feel they can now make ends meet this year – as long as there is not another lockdown.

"As long as there isn't another lockdown, I'm fairly confident we will make a profit"
Serviced, Mid

Visit Wales Tourism Barometer

June 2021

Sector Which of the following best describes your business?

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

Q1 Was your business open for the May half term?

- Yes
- No.....

Q2 *If open*

At what level of normal capacity were you operating?

- Full capacity.....
- 75 – 99%
- 50 – 74%
- 25 – 49%
- Less than 25%

Q3 *If open*

How many customers did you have during May half term compared to in a normal year?

- More than normal
- About the same as normal
- Fewer than normal
- Don't know.....

Q4 *If not open in May half term*

Are you currently taking advance bookings in 2021, including any rebooked from last year?

- Yes
- No.....

Q5 *If yes to Q1 or Q4*

How many advance bookings do you have for the remainder of 2021 compared to what you would normally have at this point in the year?

- More than normal
- About the same as normal
- Fewer than normal
- Don't know.....

Q6 *If fewer*

Why do you think you have fewer advance bookings than normal?

Prompt if necessary

- We are not actively promoting the business at the moment
- People are cautious about booking
- Reduced capacity restricts how many bookings we can take
- People booking abroad instead
- Loss of a particular market
- Lack of clarity on when to accept bookings
- Don't know
- Other

Please specify other

Q7 *If more*

Why do you think you have more advance bookings than normal?

Prompt if necessary

- Significant level of rebookings from previous cancellations
- People are desperate to get away
- UK visitors booking in Wales instead of booking abroad
- Don't know
- Other

Please specify other

Q8 *If yes to Q1 or Q4*

Approximately what percentage of your available capacity is booked for ... ? By 'available capacity' we mean the capacity level you're assuming you can operate at.

	Less than 10%	11 - 25%	26 - 50%	51 - 75%	76 - 99%	100%	Don't know	Not applicable - not taking bookings for this month
July	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
August	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
September	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beyond September	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q9 *If yes to Q1 or Q4*

Are there any booking trends you're noticing for 2021 that are different from normal?

(Prompt if necessary: different type of visitor (e.g. more or fewer older people), longer or shorter stays, more in advance / more last minute etc, queries about cancellation policies etc)

Interviewer: record also any useful comments about bookings this year

Q10 How confident do you feel about running a tourism business profitably for the remainder of this year?

- Very confident.....
- Fairly confident
- Not very confident
- Not at all confident
- Don't know.....
- Not applicable

Q11 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.....

Q12 *If staff*

And how many permanent paid staff are currently on furlough?

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

Q13 *All*

Are you currently trying to fill any staff vacancies?

- Yes
- No.....

Q14 *If recruiting*

Which of the following positions and levels of experience are you currently trying to fill?

Read out and tick all that apply

- Managerial.....
- Non-managerial but requiring high level of skill or experience.....
- Non-managerial requiring low level of skill or experience

Q15 *If recruiting*

Are you experiencing any difficulties in finding the staff you need?

- Yes – considerable difficulty.....
- Yes – some difficulty.....
- No.....
- Don't know yet

Q16 *If any difficulties*

Why do you think you're experiencing difficulties in finding the staff you need?

Unprompted, tick all that apply

- Lack of interest in working antisocial hours
- Lack of interest in low paid work.....
- Job seen as 'not a proper job'.....
- Hard to find people with the right skills or experience
- Hard to get staff to return from furlough
- Too many vacancies to fill in a short time
- Lack of students staying in the area.....
- Fewer EU workers around
- Don't have the resources to advertise
- Too much job insecurity in the tourism sector
- Don't know.....
- Other.....

Please specify other reason(s) _____

Q17 *If any difficulties*

Interviewer: probe for more details on above answer and record all useful comments

Q18 *If any difficulties*

What impact would it have on your business if you're unable to find the right staff?

Unprompted, tick all that apply

- Extra hours for existing staff
- Have to employ agency staff
- Have to train new staff with limited skills or experience
- Have to reduce capacity
- Negative impact on customer experience
- Added stress
- Don't know

Please specify other impact(s)

Q19 Interviewer: record any useful comments made during the interview

Region

Code from database

- North
- Mid
- South West
- South East

Graded or non-graded?

- Graded
- Non-graded

Name of company

Record from database
