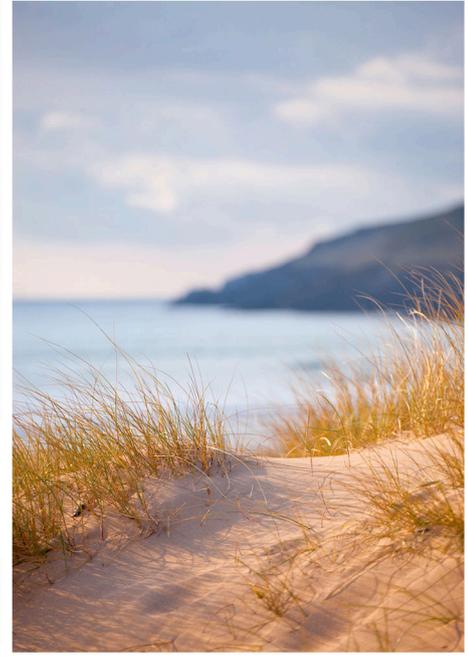


Wales Tourism Business Barometer 2021

Autumn Wave Report



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Wales Tourism Business Barometer 2021: Autumn Wave 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**

Busy autumn following on from busy summer

- 1.1 About two in five (38%) operators have had more customers compared to a 'normal' autumn (pre-Covid), a similar proportion (35%) have had the same, and 27% have had fewer. This follows on from a busy summer, when around half (48%) reported more visitors than in a normal pre-Covid summer, and 31% reported the same.
- 1.2 As seen in other barometer waves this year, autumn performance correlates strongly with operating capacity. The more 'self-contained' sectors – self catering and caravan parks – continue to perform particularly well, and being much more likely to operate at full capacity is a key reason. About half (51%) of self catering operators have had more visitors than in a normal autumn, and 29% have had the same level. About two in five (42%) caravan parks are up on visitors, and 36% have had the same level.
- 1.3 As in other barometer waves during the pandemic, the main reason for a buoyant market is that UK holidaymakers have been booking in Wales instead of abroad – 76% of those experiencing increased customer levels say this.
- 1.4 Among businesses experiencing decreased customer levels, the most frequently mentioned (38%) reason is caution over booking. Nervousness over catching Covid has increased again as colder weather has set in and Covid cases in the UK have risen this autumn.

Recruitment is still a major challenge for those looking for staff

- 1.5 28% of businesses in the serviced accommodation, pubs, restaurant and café sectors are currently trying to recruit staff. Among these, 61% are having 'considerable difficulty' recruiting and 26% are experiencing 'some difficulty'. Some say they are being forced to reduce opening times or food services as a result.

Outlook for next year depends on Covid variants and plans to holiday abroad

- 1.6 About a quarter (27%) of operators are 'very confident' about running the business profitably next year, and about half (49%) are 'fairly confident'. There are two key factors affecting confidence: whether the new Covid variant will bring further lockdowns, and whether UK holidaymakers will staycation again in large numbers or return to holidaying abroad.

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. This wave relates to autumn 2021.

How was the Survey conducted?

2.2 We have conducted 900 interviews by telephone. The results of questions asked to everyone are accurate to $\pm 3.3\%$. 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	108	40	81	57	286
Self-catering	99	47	82	39	267
Caravan / campsites	45	23	28	8	104
Hostels	7	8	2	4	21
Attractions	28	16	24	24	92
Activity operators	14	7	18	4	43
Restaurants / pubs / cafes	25	23	16	23	87
Total	326	164	251	159	900

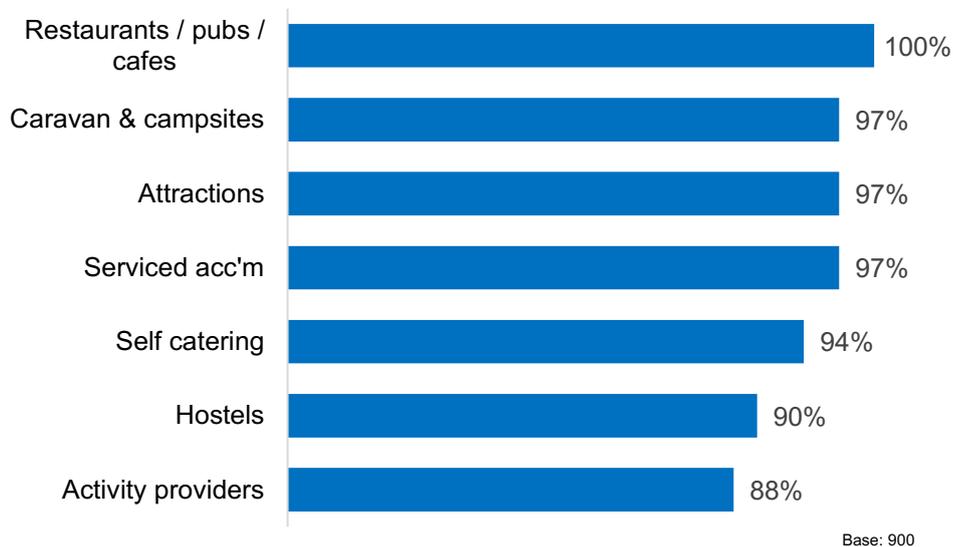
2.3 57% of businesses in the sample are graded by Visit Wales. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes, where grading is not applicable.

2.4 All telephone interviews have been conducted with business owners or managers between 22nd November and 6th December.

3. Operating Capacity and Autumn Performance

Open this year

Q1 "Has your business been open this year?"



Pleased to be open again this year

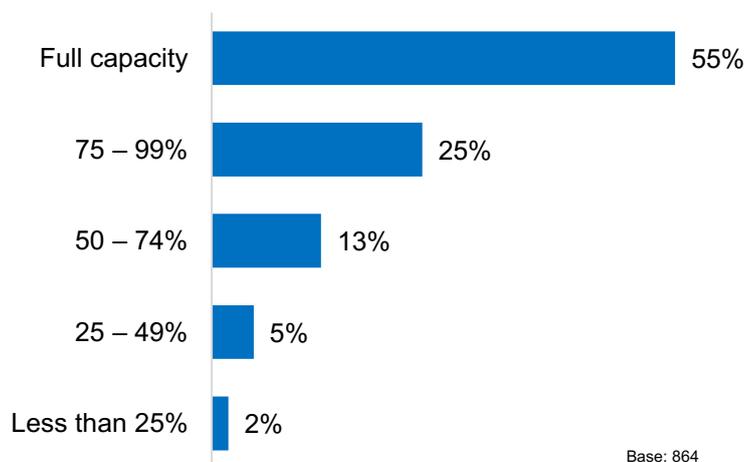
3.1 Nearly all (96%) businesses reopened at some point this year, although the proportion is lower among activity providers and hostels. Operators are generally relieved to have salvaged business from this year, which began with a lengthy continued lockdown from the end of 2020.

"We had an exceptionally busy summer this year"
Attraction, North

"People were looking for anywhere that had vacancies. They've discovered this part of the world. We were full all summer."
Self catering, Mid

Operating capacity

Q2 "At what level of normal capacity have you been operating?"



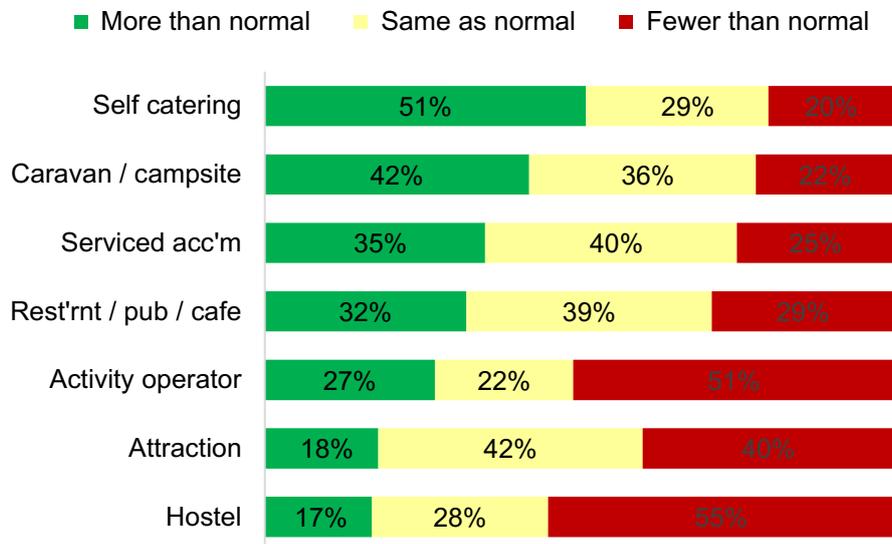
If operating capacity changed after the easing of restrictions on 7th August, we have recorded their peak level. 'Normal' capacity means pre-Covid.

Operating capacity and the effects on customer volumes

- 3.2 In spite of widescale easing of Covid restrictions by Welsh Government on 7th August, close to half (45%) of businesses have not yet returned to full operating capacity.
- 3.3 As seen in earlier research waves, the more 'self-contained' types of accommodation – self catering and caravan parks – have enjoyed higher operating capacity (72% have been operating at full capacity).
- 3.4 Challenges have remained for hostels, whereby 5 of the 19 respondents open this year have been operating at less than 50% capacity.
- 3.5 These findings are important context for the results of the following question.

Autumn visitor volumes

Q3 "How many customers have you had this autumn compared to a normal year?"



'Normal' means pre-Covid

Base: 808

Performance continues to correlate strongly with operating capacity

- 3.6 About two in five (38%) operators have had more customers compared to a 'normal' autumn (pre-Covid), a similar proportion (35%) have had the same, and 27% have had fewer.
- 3.7 The more 'self-contained' sectors – self catering and caravan parks – continue to perform the best of any sectors.

"People feel safer in self-contained accommodation"
Self catering, North

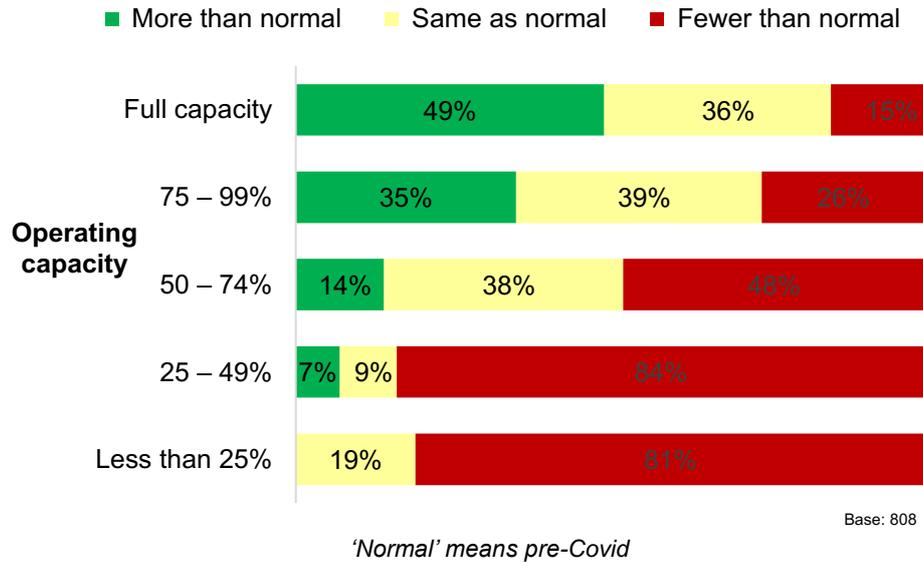
- 3.8 Caravan parks are seeing a surge in demand to purchase static caravans, and manufacturers cannot not make them quickly enough.

"Supply and demand for caravans is a nightmare. You have to wait until 2023 for a new Willerby caravan for example."
Caravan park, South West

"People are buying static caravans without even knowing the prices"
Caravan park, North

- 3.9 The following chart shows how the results of Q3 correlate strongly with operating capacity (Q2).

Q3 "How many customers have you had this autumn compared to a normal year?"



Very busy autumn if able to capitalise on demand

- 3.10 About half (49%) of businesses operating at full capacity have enjoyed a busier autumn than normal (pre-Covid), and 36% have had the same level of customers.
- 3.11 But businesses operating at less than 75% capacity have struggled to match the level of customers they would normally be able to receive in the autumn.

"In September and October this year we didn't have a free night"
 Caravan park, South West

"I've still got my sign in the window saying only four people are allowed in at a time. In the height of a summer, you could maybe squeeze in fifteen."
 Attraction, South West

Performance by region

Q3 "How many customers have you had this autumn compared to a normal year?"

■ More than normal ■ Same as normal ■ Fewer than normal



'Normal' means pre-Covid

Base: 800

Strong autumn performance in north Wales

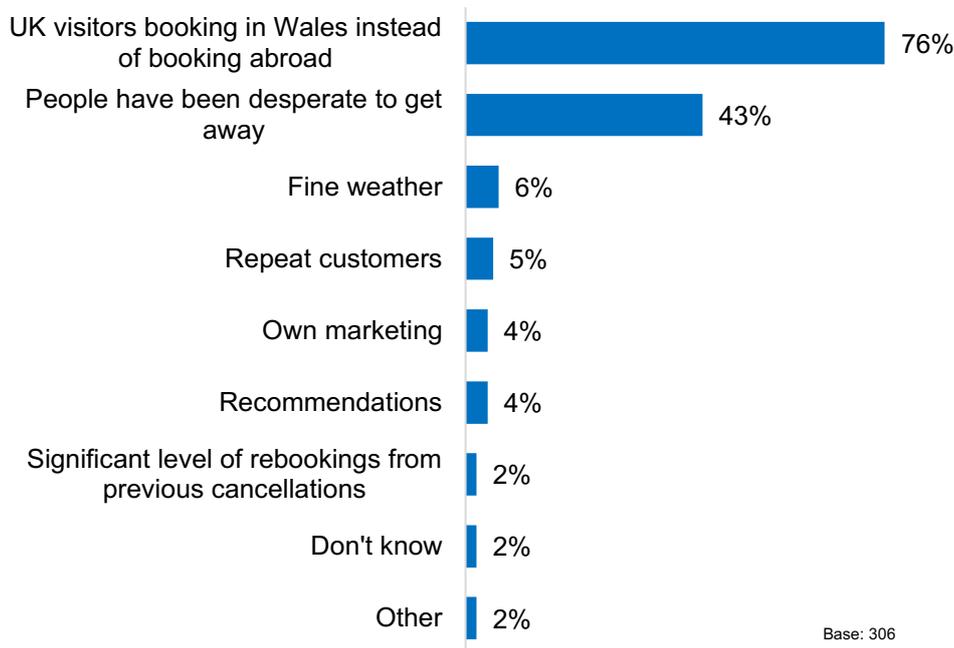
3.12 Differences by region are mostly not significant, except that north Wales has enjoyed a particularly good autumn season.

"It has been the busiest autumn we have had since we opened over 19 years ago because people's holidays abroad had been cancelled"
Serviced, North

"We have been fully booked throughout autumn for whole weeks, which is new for the time of year"
Self catering, North

Reasons for being busier

Q4 "Why do you think you have had more customers than normal?" (Prompt if necessary)



Base: 306

'Normal' means pre-Covid

Replacing the holidaying abroad

3.13 As was seen in the summer research wave, many UK holidaymakers have not travelled abroad this year like they normally would, instead opting for a UK holiday (88% of respondents reported this in the summer wave of the barometer). This trend has continued through the autumn.

"Many of our customers visit because they're desperate to travel and cannot travel abroad"

Self catering, South West

"Covid has extended the season. Any gaps got snapped up last minute. Even despite there being practically zero overseas visitors, there's pent-up demand to get away within the UK."

Serviced, South West

Bored of being at home

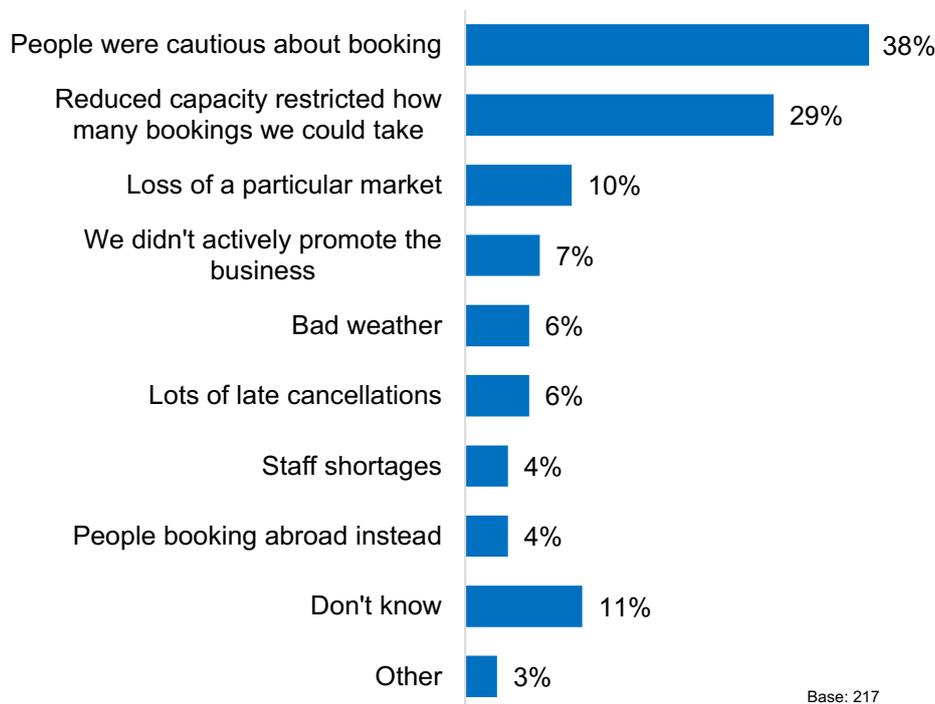
3.14 Lengthy Covid lockdowns prior to summer this year have still been having the effect of driving people out of their own homes this autumn.

"People are bored of their own homes"

Serviced, North

Reasons for being quieter

Q5 "Why do you think you have had fewer customers than normal?" (Prompt if necessary)



Base: 217

'Normal' means pre-Covid

Caution has crept in again

3.15 With Covid cases rising again in the autumn and cold weather setting in, many people have felt nervous to book through fear of the virus.

"As the weather has got colder, our customers have reduced due to concerns about Covid and the claims that it is more prevalent during the colder months"

Self catering, Mid

"People are worried about catching Covid"

Café, South East

Unable to fulfil demand

3.16 As discussed earlier, many businesses have not yet returned to full operating capacity, and this has meant not being able to fulfil demand.

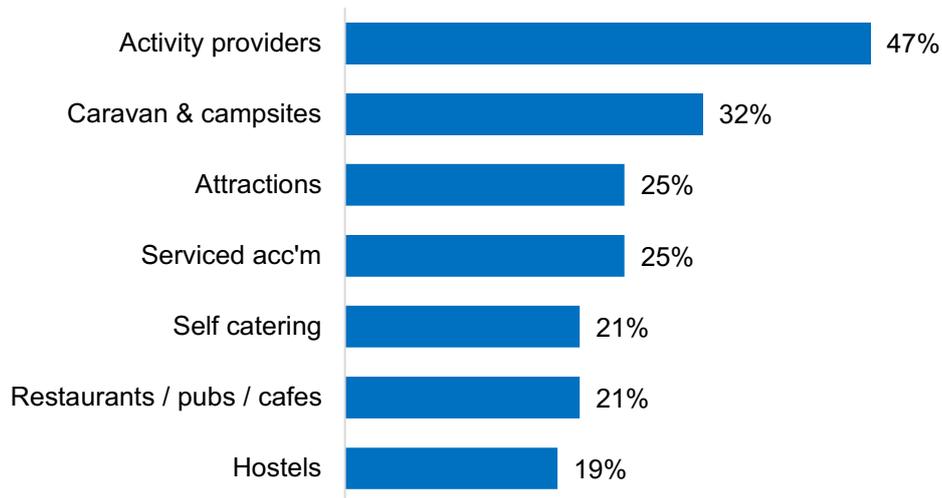
"We have split the train into compartments and are taking fewer customers at a time"

Attraction, Mid

4. Permanent Strategic Changes and Support Needed

Proportion making strategic changes

Q7 "Now that most Covid restrictions have been lifted in Wales, have you made or are you making any permanent strategic changes to how the business is run in future?" (% answering 'yes' shown by sector)



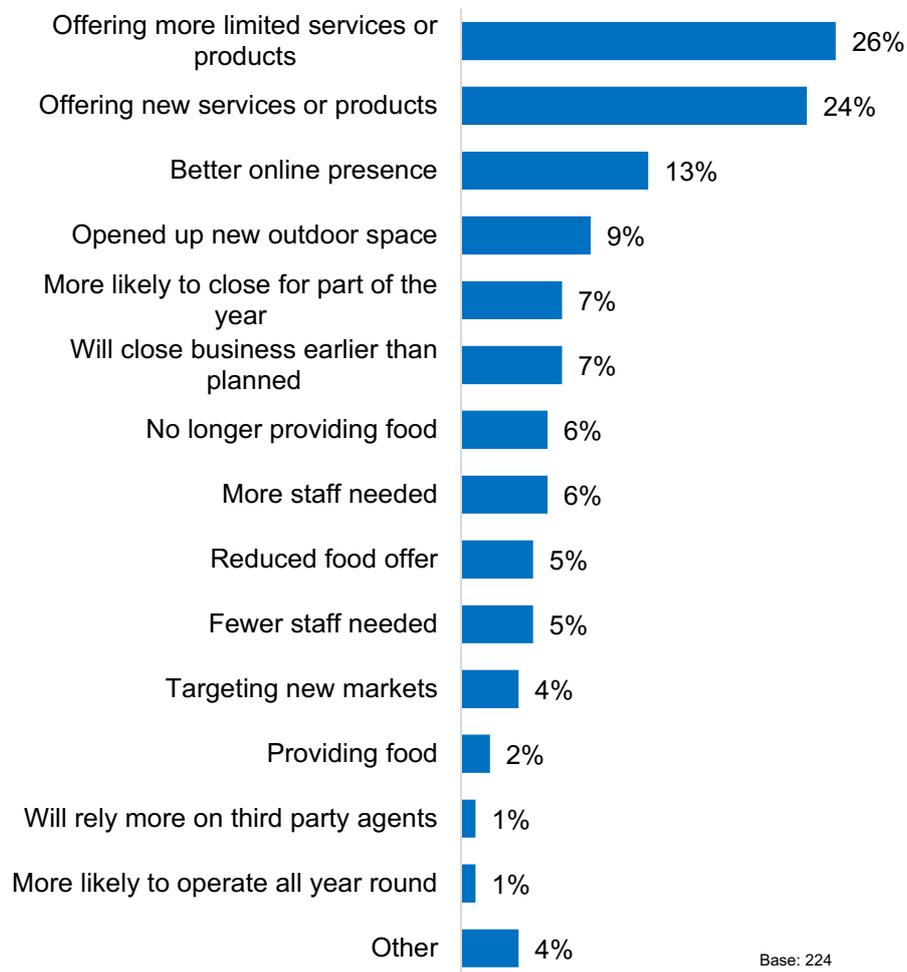
Base: 900

A quarter are making permanent changes

4.1 Welsh Government lifted most Covid restrictions in Wales in stages from early spring through to August. Experience of the past two years however has prompted a quarter (25%) of businesses to make permanent strategic changes. This is especially the case among activity providers.

Strategic changes being made

Q8 "What permanent strategic changes have you made or are you making?" (*Unprompted*)



More focused approach

4.2 Around a quarter (26%) of operators making permanent strategic changes have decided to focus their efforts on a particular core product or service rather than trying to do too much. Decisions often rest on what is most profitable, enjoyable or the least hassle. Examples include more private / exclusive focus for activities, and seasonal caravan pitches rather than short-stay touring.

"We've started to take on fewer bookings and make it more of a private and exclusive business. It has worked really well."

Activity provider, South West

"We'll be going fully seasonal. Visitors will be seasonal, rather than week-enders. We'll be taking a lot fewer [touring] pitches."

Caravan park, North

“It’s a different business now, because of Covid. We used to have tourers but have turned the pitches into seasonal pitches. People used to come and go for weeks or weekends but now they’re here most of the year.”

Caravan park, South East

New products and services

- 4.3 While some businesses are becoming more focused on a particular core offering, a similar proportion (24%) of those making strategic changes are going the opposite way by introducing new services or products.

“We’re buying our own hut to welcome visitors in”

Attraction, North

“We have an indoor assault course in the making for inside. It will be ready in January.”

Attraction, Mid

Better online presence

- 4.4 13% of operators in particular are now enjoying better online presence than they used to have pre-Covid because of having to take bookings that way. This is especially the case for non-accommodation operators: about a quarter (26%) of non-accommodation operators making strategic changes say they will now keep their improved online presence.

“The lockdown gave us the opportunity to develop the website. Online sales have since picked up.”

Attraction, South West

Changes in food offering

- 4.5 Some (6%) businesses making strategic changes say they are no longer providing food, 5% say they are reducing their food offering, and 2% say they are introducing food. Specifically among serviced accommodation operators, 15% of those making strategic changes are no longer providing food and 14% are reducing their food offering.

“We have had to change our model to self-sufficient rooms only as the local council has given planning permission for a huge hotel to be built in our village and we can’t compete with that”

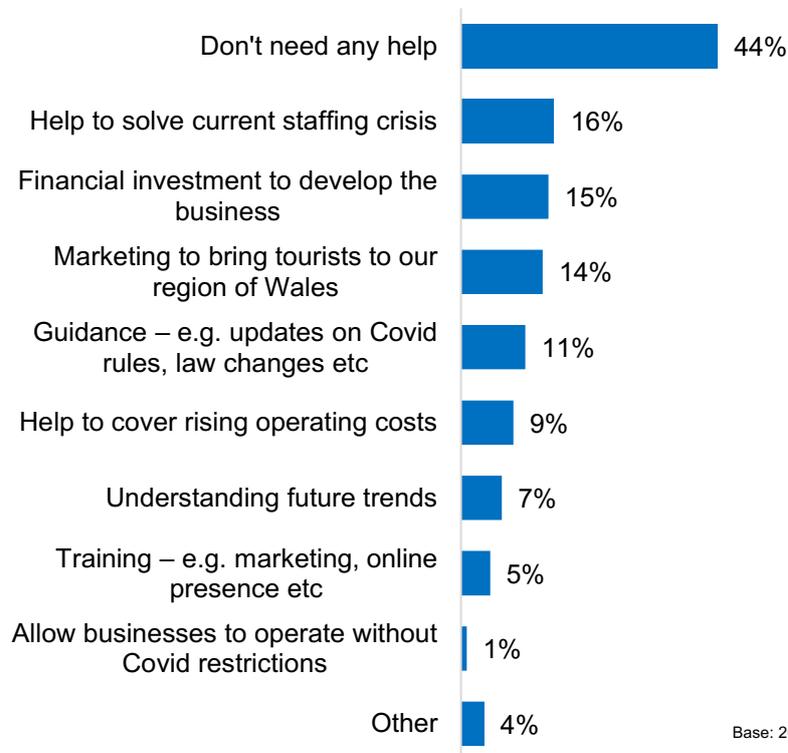
Serviced, North

“We’ve opened up a beer garden and are doing takeaways as well as deliveries of food and drink to caravans”

Caravan park, South West

Support needed to make strategic changes

**Q9 "What help, if any, might you need from Visit Wales, Business Wales or Welsh Government in running your business differently in future?"
(Unprompted)**



Q9 has been asked to businesses making strategic changes, except for retiring early. Welsh Government wished to know in this wave how it can focus support for strategic changes.

We are fine, thank you

4.6 Close to half (44%) of those making strategic changes feel that they don't need help from Welsh Government to make those changes. To some extent, this proportion might be high because some businesses have already made or are far advanced into making those changes.

"We have 100 people on the waiting list for 7 pitches. So we don't need any help"
Caravan park, Mid

"We have an excellent marketing team"
Caravan park, North

Recruitment difficulties

- 4.7 We look at the current staffing crisis in more detail in Section 6. Some of the businesses experiencing problems would like Welsh Government to intervene.

*“We have had to close two nights a week as we only have two chefs instead of four.
We are really struggling on Anglesey.”*
Serviced, North

Financial investment

- 4.8 15% of those making strategic changes would like financial investment to renovate or develop facilities.

“We need extra financial support to help renovate business facilities”
Self catering, Mid

“We need supportive funds to renovate the facilities as they are outdated”
Self catering, South West

Marketing to bring tourists to the region

- 4.9 14% of those making strategic changes would like Visit Wales to market their region and attract tourists. Requests range from more general regions to specific towns.

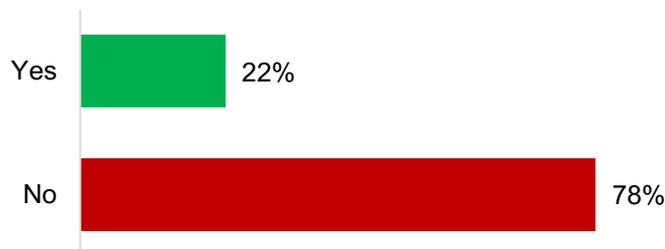
“A little documentary about Llandudno on the TV would be good”
Caravan park, North

- 4.10 Visit Wales has been running an ‘autumn and winter’ campaign, discussed in the next Section.

5. Campaign Awareness and Advance Bookings

Awareness of Visit Wales 'Autumn and winter' campaign

Q11 "Are you aware that Visit Wales has been running an 'autumn and winter' marketing campaign during the past few months, with the aim of attracting more visitors to Wales at this time of year?"



Base: 900

Some operators are aware

- 5.1 22% of operators are aware that Visit Wales has been running an 'autumn and winter' campaign to try and attract more visitors to Wales at this time of year. Whilst this is only a minority, we should view this result in the context of the campaign targeting consumers outside of Wales, not businesses in Wales.
- 5.2 There is some variation in awareness by sector. Attractions & activity providers are the most aware (30%), along with serviced accommodation (26%). Lower awareness is found among self catering and caravan & campsites (18%), and restaurants, pubs & cafes (10%). Differences by region are not significant.

"I'm hoping that this new autumn-winter campaign will bring more tourists to Wales"
Self catering, South West

Evidence of extended season

- 5.3 The increased visitor numbers this autumn compared to pre-Covid, along with some open comments, suggest that the Welsh tourism industry has enjoyed an extended busy season this year through the autumn. Whether or not the increased visitors have come as a result of this campaign is not possible to tell from this research, but the industry has certainly been busy this autumn.

"It normally quietens down during September but this time it was busy all the way until the end of November. So an extra two months of trade."
Self catering, South West

"We're only open weekends at the moment but we're getting around 200 people a day. Normally at this time of year, you can count the numbers on two hands."
Attraction, North

“It is interesting that you mentioned Visit Wales' marketing campaign because our winter months are really busy too”
 Serviced, North

Advance bookings

Q15 "How many advance bookings do you have between now and the end of February compared to what you would normally have at this point in the year?"

■ More than normal ■ Same as normal ■ Fewer than normal



Q15 has just been asked to accommodation providers

Concerns over new variant and further restrictions

5.4 Visit Wales' autumn and winter campaign has aimed to attract bookings all the way through the winter to the end of February. Whilst some accommodation operators say they have more advance bookings than they normally would for the winter, emergence of the Omicron variant has unfortunately dampened what might otherwise have been a better period.

“People are apprehensive about going out because of the current global climate”
 Self catering, Mid

“Fear of Covid is reducing bookings”
 Self catering, South East

“We're probably too busy ... Christmas and New Year are booked and people are coming in January and February. It's continuous. It's never been like this before.”
 Self catering, Mid

“We're expecting a slow start to winter 2022 but a boom heading into the summer”
 Activity provider, South East

5.5 There is some variation in advance booking levels by region:

- 26% of accommodation operators in north Wales and 22% in mid Wales have more advance bookings

- This compares to 17% in south west Wales, and 12% in south east Wales

Visitors would need things to do in the winter

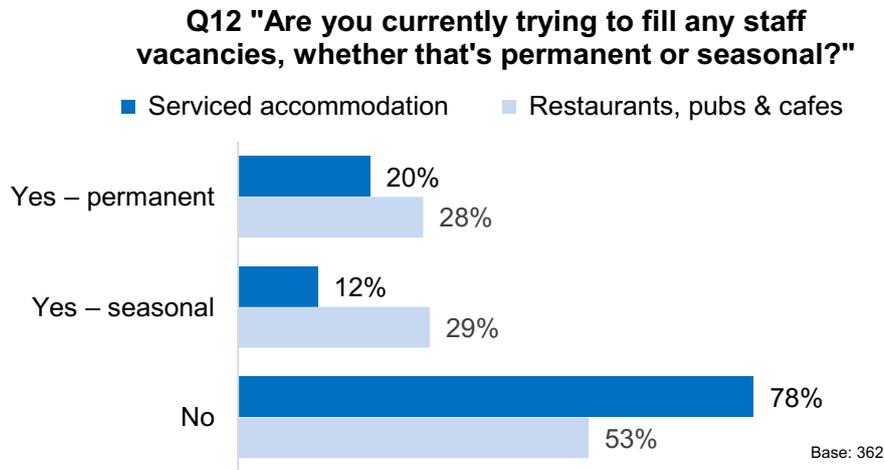
5.6 Some accommodation operators point out that whilst they remain open in the winter, visitors need more to do in their area if they are to be encouraged to come. Many attractions and places to eat and drink close down.

“A lot of businesses in north Wales are really suffering as there is nothing to do here in the winter”
Serviced, North

“The restaurants and cafes here are closed for the winter, so unless you have a car, there is nowhere for you to go for a decent meal ... I discourage people to come here as there are no facilities for them to use”
Serviced, North

6. Recruitment

Vacancies



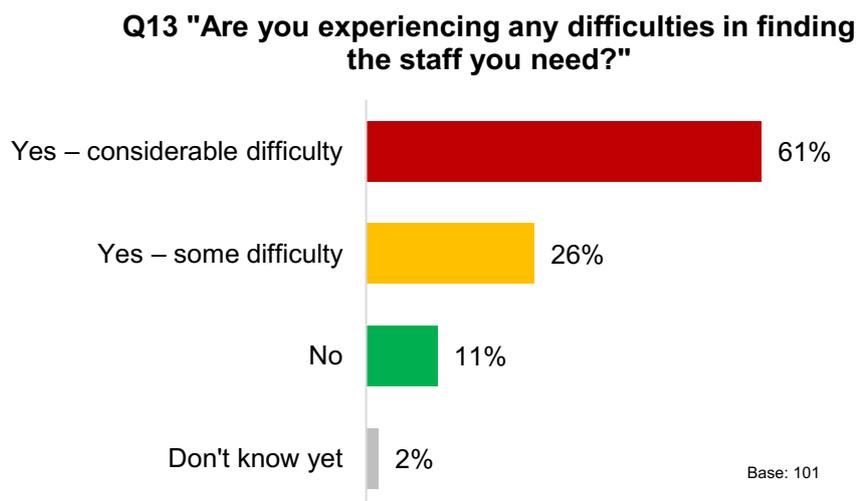
Q12 has been asked to serviced accommodation, restaurants, pubs & cafes

Some are looking to recruit

6.1 32% of serviced accommodation operators and 47% of restaurants, pubs & cafés are currently trying to fill staff vacancies.

6.2 Vacancies are highest in south east Wales, where 36% of respondents are looking for staff.

Difficulties in recruitment



Q13 has been asked to those looking for staff

Continued difficulties for most who need new staff

- 6.3 Questions on recruitment difficulties were last asked in the June wave of the barometer. Taking into account the sectors featuring this time, results are no different to before: about three in five (61%) respondents are experiencing considerable difficulties in recruiting. All regions of Wales are struggling.
- 6.4 This is having a significant effect on businesses, with some being forced to reduce opening times or food services. It is particularly hard to recruit chefs right now.

“Without staff, we are struggling to do the work. We can fill the hotel but can't offer the services because we can't find workers.”

Serviced, Mid

“We've stopped doing parties and cabaret due to not being able to find the right staff for the demand”

Serviced, South East

“Our restaurant is closed at the moment through lack of chefs”

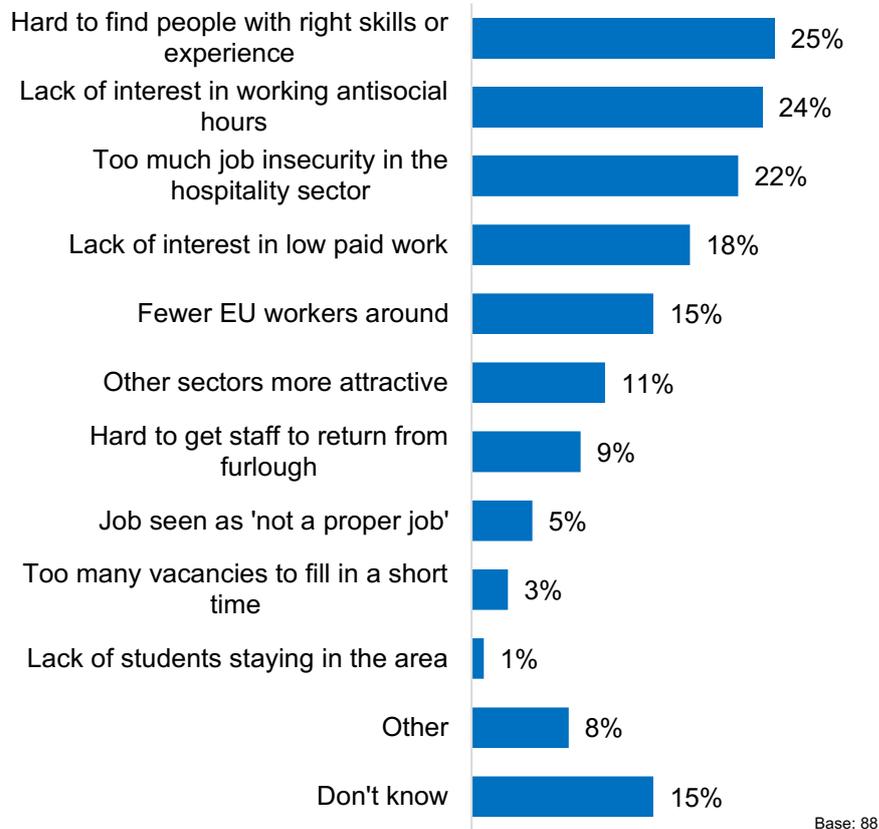
Serviced, North

“The whole hospitality industry has been on its knees with the lack of staff. We cannot provide lunch anymore so are losing money because of it.”

Pub, North

Perceived reasons for difficulties

Q14 "Why do you think you're experiencing difficulties in finding the staff you need?" (Unprompted)



Q14 has been asked to those having difficulties in recruiting

Many perceived reasons

6.5 As we also saw in the June research wave, there are many perceived reasons combining to make staff recruitment very difficult in the industry. The situation has not changed: many workers do not see the sector as attractive enough with the perceived low pay, antisocial hours and job insecurity. This appears to have become worse since Covid, and lack of EU workers around who previously filled many of the jobs in the sector is not helping either.

"Staff are on minimum wage and we cannot pay more"
Serviced, North

"Brexit has meant we have lost staff from overseas"
Serviced, South East

6.6 The furlough scheme is now over, but 9% of respondents have found it hard to get staff to return to work for them. In some cases employees have found work elsewhere; in other

cases employees may have chosen not to return to work at all, at least in the short term. The employers themselves don't always know.

- 6.7 Some operators in sectors not featuring in these questions have also commented when discussing their business performance:

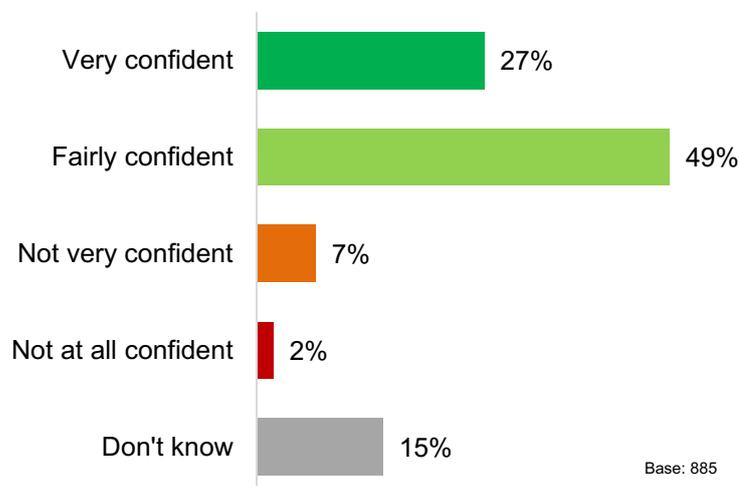
“We can't get staff – we have ads everywhere – I've spoken to the Department for Work and Pensions but we can't recruit. A chef can train to be a driver and earn double, so why be a chef anymore? We've advertised for senior members of staff, chefs, down to waiters. Nothing. Once people went on furlough, they learnt to live on lower wages. Work-life balance became more important so they don't want to work the long hours.”

Caravan park, North

7. Confidence

Confidence overall

Q16 "How confident do you feel about running the business profitably next year?"



Reasonable level of confidence

7.1 Overall confidence for next year is reasonably high; it depends on several key factors, discussed in turn below.

Confident if no more lockdowns – but Omicron looms ominously

7.2 Operators had mostly been looking forward to getting back to normal next year, following two years significantly hampered by Covid restrictions. Unfortunately, the Omicron variant of Covid has recently been discovered, causing governments across the world to scramble to contain it. In Wales, there have been no announcements of return to lockdown, but some operators fear it could happen.

“As long as we don't have any more lockdowns, I'm confident we will be fine”
Activity provider, South West

“Yesterday I would have said I was very confident but now that this new variant is here from South Africa, we don't know whether there will be another lockdown. If there isn't then we will be busier than ever.”
Serviced, North

“I would say we're very confident but this new variant has given me less confidence, with a possible new lockdown”
Activity provider, North

Depends on what happens with holidays abroad

7.3 Demand for UK domestic summer holidays has been high the past two years because of restrictions going abroad. For the industry in Wales next year, a lot depends on whether UK holidaymakers will resume holidays abroad. Some operators believe they will, whereas others predict another buoyant year of staycations.

“I still think next year will be the same as this year. A lot of people are saying they still don't want to go abroad. I think [domestic] demand will die off the year after.”

Caravan park, North

“This year has been exceptionally good because of the travel restrictions. Many elderly people have told me that they won't be going abroad again, so that's good for Wales. If Covid is still with us then next year will be good, but if Covid is gone then people will flee abroad.”

Self catering, North

“It depends on Covid and if people decide to go abroad as groups of families, then that would make it difficult for us”

Hostel, South East

“It's going to be bedlam until people are flying again, and then it will go back to normal.”

Caravan park, North

Escalating costs

7.4 Turnover is one factor affecting profitability; the other is costs. Whilst demand for holidays in Wales next year could be high, some operators are concerned about being able to cover rising operating costs.

“The costs are going through the roof: electricity, building repairs etc. The agents are taking their cuts. It's getting harder to make a profit. I feel like I'm treading water.”

Self catering, South West

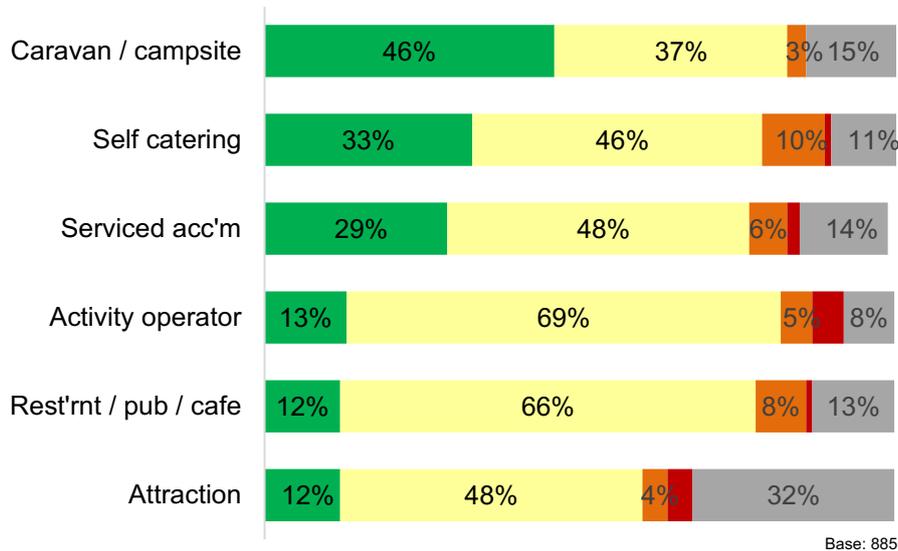
“Gas, electric, banking costs are all going up. The profit margins are getting less.”

Self catering, South West

Confidence by sector

Q16 "How confident do you feel about running the business profitably next year?"

■ Very confident ■ Fairly confident ■ Not very confident
■ Not at all confident ■ Don't know



Confidence is higher among accommodation operators

7.5 Accommodation operators are in a noticeably more buoyant mood compared to non-accommodation operators.

Can't build the caravans fast enough

7.6 One unusual issue affecting the caravan sector at the moment is that the supply of new static caravans is not keeping up with surging demand for them. Some smaller independent caravan parks claim that large national chains are being given priority over supply.

"Caravan sales are a potential black hole. People aren't selling and we can't get them manufactured quick enough so we are left with empty pitches. The bigger companies get the first dibs."

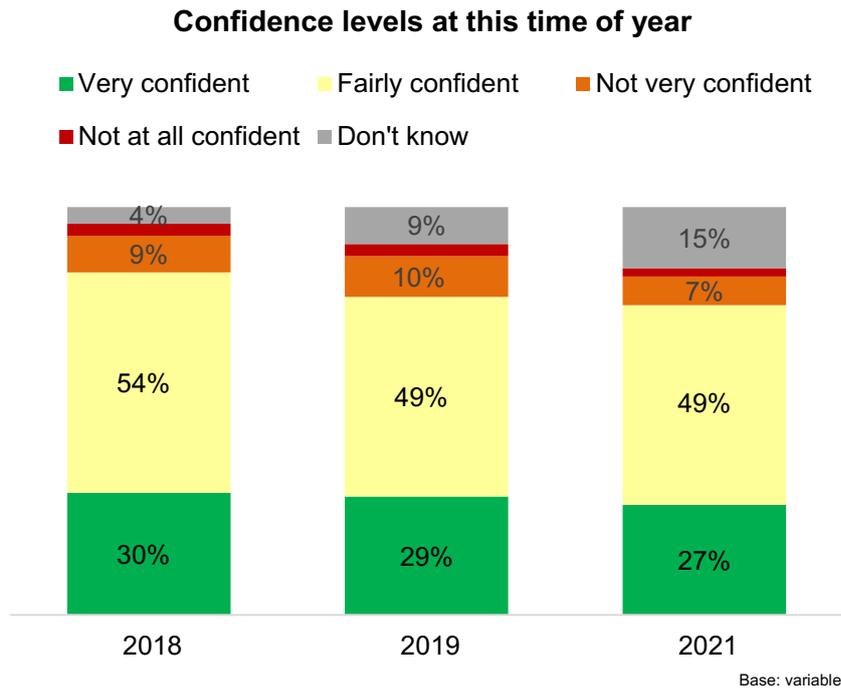
Caravan park, North

"It's going to be chaotic – we can't get caravans till 2023"

Caravan park, Mid

7.7 Otherwise, caravan park operators expect to enjoy further success on the back of a very busy 2021.

Confidence trend



A barometer wave was not conducted this time last year

Similar level of confidence to 'normal' years

7.8 The level of confidence in the industry right now is comparable to pre-Covid at this time of year.

"We are already taking bookings extensively for next year. I have a lot of return bookings too. It's looking really good right up to September."

Self catering, North

"We are fully booked until September 2022"

Serviced, South West

"I'm hugely confident about next year"

Activity provider, Mid

Barometer Questionnaire November

Sector Which of the following best describes your business?

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

Q1 Has your business been open this year?

- Yes
- No.....

Q2 At what level of normal capacity have you been operating?

If increased capacity part way through the year, record the peak level. 'Capacity' can also relate to services as well as rooms.

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

Q3 How many customers have you had this autumn compared to a normal year?

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

Q4 Why do you think you have had more customers than normal?

Prompt if necessary

- UK visitors booking in Wales instead of booking abroad.....
- People have been desperate to get away
- Significant level of rebookings from previous cancellations.....
- Fine weather
- Repeat customers
- Recommendations
- Own marketing.....
- Visit Wales' 'Autumn and winter' campaign.....
- Don't know.....
- Other.....

Please specify other

Q5 Why do you think you have had fewer customers than normal?

Prompt if necessary

- Reduced capacity restricted how many bookings we could take
- Bad weather
- Staff shortages.....
- We didn't actively promote the business
- People were cautious about booking
- People booking abroad instead
- Lots of late cancellations.....
- Loss of a particular market.....
- Lack of clarity on when to accept bookings
- Don't know.....
- Other.....

Please specify other

Q6 *Interviewer: record any useful comments made about performance this autumn*

Q7 Now that most Covid restrictions have been lifted in Wales, have you made or are you making any permanent strategic changes to how the business is run in future? Examples could include switching from self catering to serviced accommodation or vice versa, operating all year round, extending the premises or targeting new markets

- Yes
- No.....

Q8 What permanent strategic changes have you made or are you making?

Interviewer: if it becomes clear that changes are not permanent and strategic, go back and change the previous answer to 'no'

- Providing food.....
- No longer providing food.....
- Reduced food offer.....
- Offering new services or products
- Offering more limited services or products
- Targeting new markets
- Opened up new outdoor space.....
- More staff needed
- Fewer staff needed.....
- Better online presence.....
- Will rely more on third party agents.....
- Will retire / permanently close the business earlier than planned
- More likely to operate all year round
- More likely to close for part of the year.....
- Other.....

Please specify other

Q9 *If any permanent strategic changes except retiring*

What help, if any, might you need from Visit Wales, Business Wales or Welsh Government in running your business differently in future?

- Help to cover rising operating costs
- Financial investment to develop the business.....
- Marketing to bring tourists to our region of Wales
- Help to solve current staffing crisis
- Training – e.g. marketing, how to have better online presence etc
- Guidance – e.g. updates on Covid rules, law changes etc.....
- Allow businesses to operate without Covid restrictions.....
- Understanding future trends.....
- Don't need any help.....
- Other.....

Please specify other help needed _____

Q10 *If any permanent strategic changes except retiring*

Interviewer: probe for details of help needed and record all useful comments

Q11 *All*

Are you aware that Visit Wales has been running an 'autumn and winter' marketing campaign during the past few months, with the aim of attracting more visitors to Wales at this time of year?

- Yes
- No.....

Q12 *Restaurants, pubs, cafes & serviced accommodation unless retiring*

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

- Yes – permanent.....
- Yes – seasonal (*e.g. for Christmas*)
- No.....

Q13 *If recruiting*

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

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

Q14 *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
- Other sectors more attractive
- Lack of students staying in the area
- Fewer EU workers around
- Don't have the resources to advertise
- Too much job insecurity in the hospitality sector
- Don't know
- Other

Please specify other reason(s)

Q15 *Accommodation businesses unless retiring*

How many advance bookings do you have between now and the end of February 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
- Not applicable – not taking advance bookings during the winter

Q16 *All unless retiring*

How confident do you feel about running the business profitably next year?

Interviewer: If a public-funded attraction, ask about confidence to cover operating costs if they feel the word 'profitably' doesn't apply to them

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

Q17 *All unless retiring*

Finally, do you have any comments to make about your expectations for next year?

Interviewer: record any booking trends and also any useful comments made about any strategic changes
