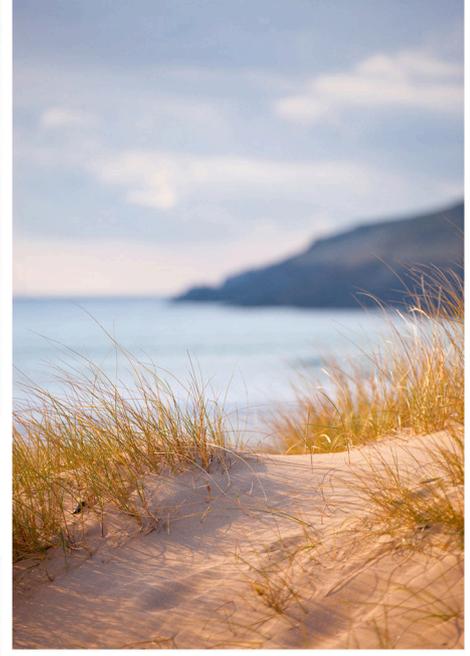


# Wales Tourism Business Barometer 2022

## Spring Wave Report



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# Wales Tourism Business Barometer 2022: Spring 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**

### **Fairly slow start to the year for some**

- 1.1 2022 has got off to quite a slow start for some businesses which have been open during the period from New Year to mid March. About one in five (21%) have had more customers year to date compared to the same period in a 'normal' year, and around half (47%) have had the same level. About one in three (32%) have experienced a decrease.
- 1.2 Lingering Covid restrictions at the start of the year are a key reason behind the slow start, and winter storms have also disrupted business for some.

### **Easter, May and early June look fairly promising based on advance bookings**

- 1.3 Average booked capacity for the school Easter holidays among accommodation operators is approximately 68%, and for May & early June it is 54%. Some say that the last minute booking trend since Covid started means occupancy for those periods could still rise significantly. However, there is also a trend since Covid to cancel bookings, and so the true picture is hard to predict accurately in advance.

### **Reasons to be positive about this year**

- 1.4 'Covid restrictions ending / pandemic subsiding' is the most frequently mentioned (31%) unprompted reason to be positive about business this year. This is followed by expected (but not yet received) high levels of UK bookings (23%) and high levels of repeat customers (20%).

### **Escalating costs are making Covid look like old news**

- 1.5 The price of energy and many other items has increased so much in a short time that suddenly Covid, which has dominated lives for the past two years, now seems like a side show. 43% cite rising energy costs unprompted as a particular concern, and 31% cite rising costs beside energy. By comparison, only 12% (unprompted) are concerned about Covid restrictions being reintroduced.

### **Confidence for this year**

- 1.6 About a quarter (27%) of operators are 'very confident' about running the business profitably this year, and a further 47% are 'fairly confident'. Operators generally expect visitor volumes to be high this year, especially from the UK, but profitability is being squeezed by rising operating costs.

## 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 spring 2022.

### 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	135	34	75	52	296
Self-catering	77	45	93	41	256
Caravan / campsites	47	21	31	16	115
Hostels	2	7	7	6	22
Attractions	27	15	16	26	84
Activity operators	18	10	12	2	42
Restaurants / pubs / cafes	17	28	18	22	85
<b>Total</b>	<b>323</b>	<b>160</b>	<b>252</b>	<b>165</b>	<b>900</b>

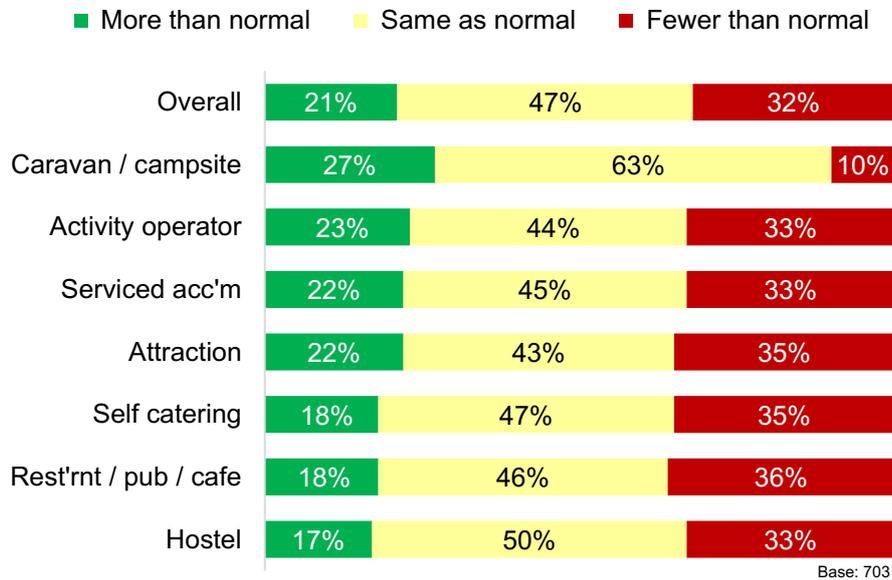
2.3 57% of businesses in the sample are graded by Visit Wales. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes, where grading is not applicable.

2.4 All telephone interviews have been conducted with business owners or managers between 14<sup>th</sup> and 25<sup>th</sup> March.

### 3. Performance to Date

#### Performance to date in 2022

Q2 "How many customers have you had during the period from New Year up until now compared to a normal year?"



Q2 has been asked to the 703 businesses in the sample of 900 which have been open so far this year

#### Fairly slow start to the year for some

3.1 2022 has got off to quite a slow start for some businesses which have been open for at least some of the period from New Year to mid March. Lingering Covid restrictions at the start of the year are a key reason behind these results. Operating capacity has restricted customer numbers for some, and some types of event have not been allowed to take place at all.

*"It would have been our busiest January on record but the restrictions came in and weddings had to be cancelled"*  
 Serviced, North

*"We were restricted to only having ten customers in at once. But it should ease a little in the coming month."*  
 Attraction, South West

*"New Year was a wash out because of the restrictions – no music, no dancing"*  
 Serviced, North

#### Winter storms

3.2 Heavy storms during the winter have disrupted business for some operators.

*"Really bad storms this winter means we are doing lots of rearranging"*  
 Activity operator, North

*“We are closed at the moment because of significant building damage”*  
Attraction, North

### But a good start to the year for some

3.3 Around one in five (21%) operators have had more customers than normal for this early period in the year and are happy with how business is going.

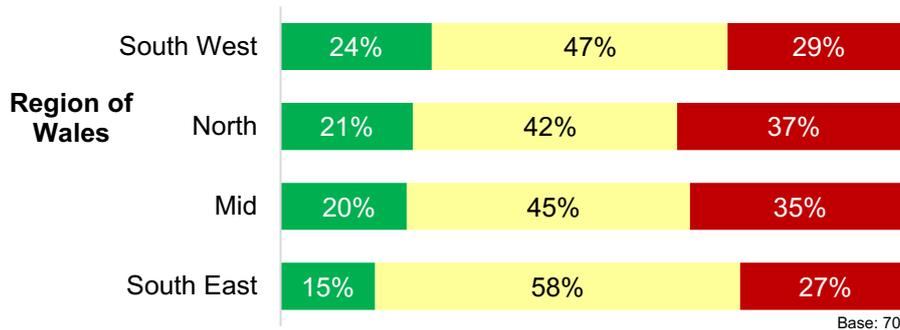
*“This winter was like pre-Covid figures”*  
Serviced, North

*“We have had a steady flow of customers over the winter, with spikes when the rugby days were on”*  
Café, South East

### Differences by region

**Q2 "How many customers have you had during the period from New Year up until now compared to a normal year?"**

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



Q2 has been asked to the 703 businesses in the sample of 900 which have been open so far this year

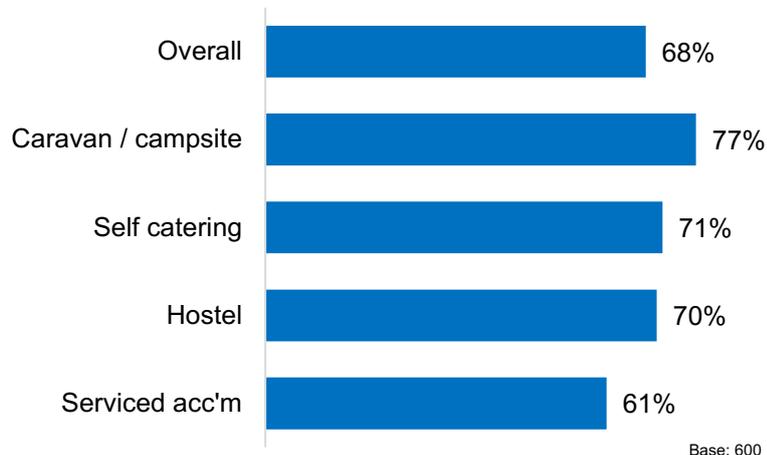
### South West Wales has performed better than the other regions to date

3.4 South West Wales is the only region where the proportion of operators increasing business (24%) is comparable to the proportion seeing a decrease (29%).

## 4. Advance Bookings for Easter, May and Early June

### Advance bookings for Easter

Q3 "Looking ahead, about how much of your available capacity is booked for the school Easter holidays?" (av. occupancy shown)



Q3 has been asked to accommodation operators taking bookings

### About two thirds full for Easter

- 4.1 Average booked occupancy for the school Easter holidays is approximately 68%. There is variation by sector, with caravan parks looking particularly busy and occupancy in serviced accommodation a bit behind the other sectors.
- 4.2 Average occupancy in South East Wales is approximately 73% – ahead of the other regions (67%).

### Last minute booking behaviour makes the picture hard to read

- 4.3 Some operators comment that advance bookings only give a partial view of what the coming period will actually be like. Booking trends seem to have become more last minute during the pandemic, and the trend seems to be continuing for now, even though Covid is less of a reason than before for holding off booking. The weather and rising cost of living are key reasons for consumers waiting longer before committing.

*"We think we will get a lot of last minute bookings because of the price of everything – fuel and energy"*  
Self catering, North

*"People generally book late with us – like a week before – so advance bookings aren't a true representation of how the period will be"*  
Serviced, Mid

*"We are finding that since the pandemic there have been much more last minute bookings"*

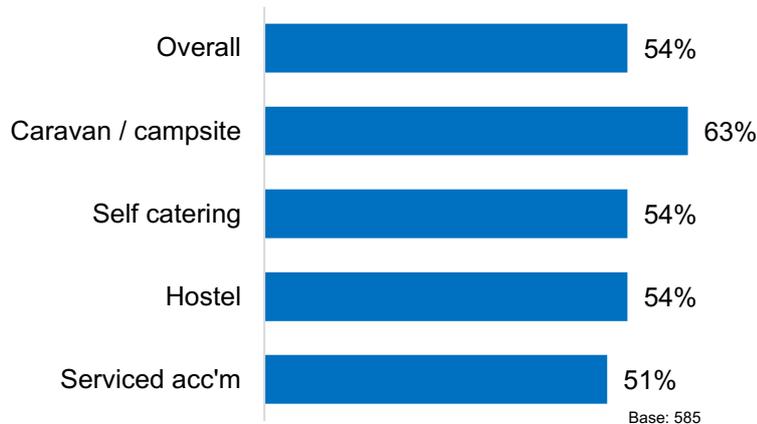
Serviced, North

*"People book last minute. They are waiting to see what the weather is like. If the weather is good, the people will come."*

Self catering, North

## Advance bookings for May and early June

**Q4 "And about how much of your available capacity is booked for May & early June?" (av. occupancy shown)**



Base: 585

Q4 has been asked to accommodation operators taking bookings

### Bed stock is around half full for May & early June

4.4 This year features a Platinum Jubilee bank holiday on Friday 3<sup>rd</sup> June following the altered late spring bank holiday on Thursday 2<sup>nd</sup> June to form a long weekend. In most cases this also overlaps with the school half term holiday.

4.5 Current booked occupancy for the month May & early June is approximately 54% on average. As with Easter bookings, caravan & campsites look busier than the other sectors as it currently stands.

### Last minute booking behaviour can change the picture significantly

4.6 As with Easter, the performance of the industry could yet change significantly in May & early June as the expected last minute bookings come in much closer to the time.

*"We take a lot of late bookings so we will likely be fully booked closer to the time"*

Self catering, South East

*“People are holding back from making bookings until about a month before. For August, we’re on 20% occupancy, but the upcoming months are filling up.”*  
Serviced, North

### **Cancellations can also change the picture**

4.7 Whilst last minute bookings can suddenly improve the busyness of the tourism industry, the trend of rising cancellations since Covid started can send it the other way. Trying to predict what upcoming periods hold is therefore difficult.

*“It seems to be messy this year ... people are booking with cancellations in mind ... Booking.com are giving people risk-free policies which are not my policy. Guests don’t have to pay until the day they actually come now.”*  
Self catering, South West

### **Weekends are filling up, but not mid-weeks**

4.8 One other noticeable trend at the moment is that whilst weekends are getting booked, weekdays seem to be harder to fill in advance. Stays being booked are often short breaks, but less likely holidays.

*“We’re only booked on the weekends for May and early June”*  
Serviced, South East

*“People aren’t coming for long breaks ... the weekends are going but not in between”*  
Self catering, South West

*“Bookings are down this year on last year. It’s mid-week that I’m struggling with. Weekends are fine.”*  
Serviced, North

### **Differences by region**

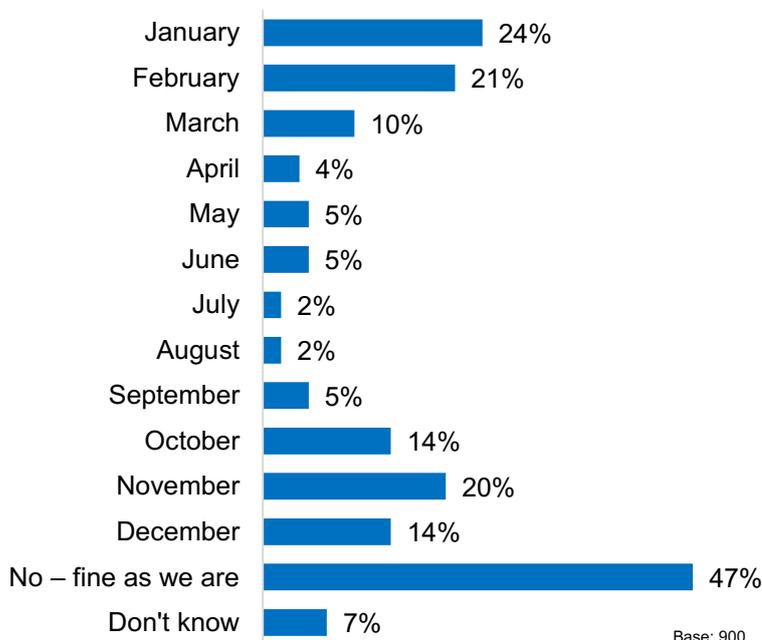
4.9 Whereas South East Wales is faring better than the other regions with advance bookings for Easter, the opposite is true for May & early June. Approximate average booked occupancy levels by region are:

- North: 60%
- Mid: 57%
- South West: 50%
- South East: 45%

## 5. Seasonal Business

### Level of desire to fill quieter months

Q6 "Are there any months of the year when you usually have spare capacity that you would particularly like to fill?"



### Around half have no interest in filling spare capacity in quieter months

- 5.1 Operators generally seem not to have too much trouble filling space from April to September inclusive, and then some would like to boost the colder / darker half of the 12 month seasonal cycle.
- 5.2 However, around half (47%) of operators say they are fine as they are. Many tourism businesses in Wales are owner-managed and this often involves working seven days a week during the busy season. Having downtime from customers for some of the year is actually appreciated. A lot of the maintenance work takes place during the quieter winter months.

*"January and February are usually quiet but we are quite happy with that as it gives us the time to do any work on the flat. We have installed a new kitchen this year."*  
Self catering, North

*"We are quieter in the winter months but we don't mind that as we use these months for repairs and maintenance"*  
Caravan park, South West

### **Some significant differences by sector**

- 5.3 Activity operators are more likely to want help filling quieter months than the other sectors. Around three in four (76%) would particularly like to fill some of their spare capacity – most commonly in December (52%) and January (55%).
- 5.4 Restaurants / pubs / cafes are the next most likely (66%) sector to want to fill spare capacity, especially in January (41% say this).
- 5.5 Within the accommodation sectors, caravan & camping differs from the others in that they are more interested in filling the shoulder seasons than the winter months. Each of May, June, September and October are targeted for increased occupancy by around one in seven caravan & campsite operators.

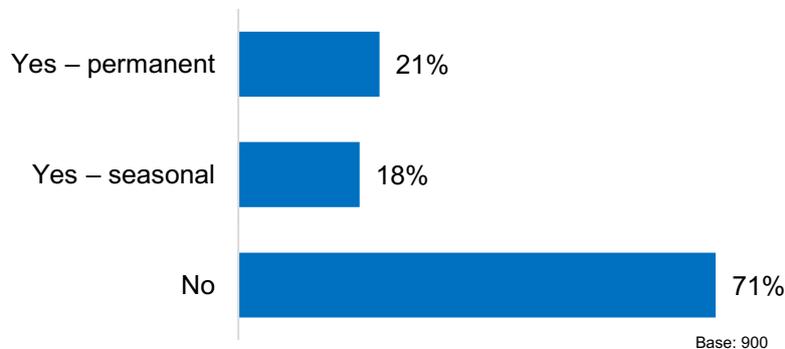
### **Mid Wales more in need of filling the quieter months**

- 5.6 Around two thirds (64%) of operators in mid Wales say there are months of spare capacity they would like to fill (mainly the winter months). This compares to 55% of businesses in North Wales, 50% in the South West and 46% in the South East.

## 6. Recruitment

### Vacancies

**Q7 "Are you currently trying to fill any staff vacancies, whether that's permanent or seasonal?"**



### Some are looking to recruit

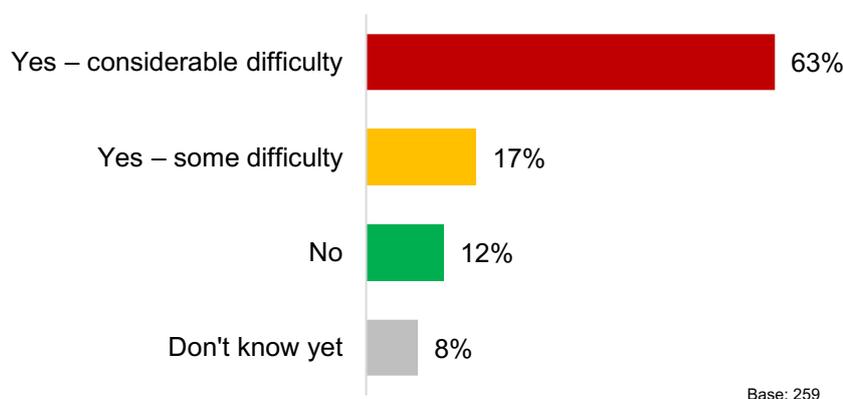
6.1 29% of businesses are currently trying to fill staff vacancies, whether permanent and/or seasonal. The proportion is higher among:

- Restaurants / pubs / cafes (62%)
- Activity operators (50%)
- Serviced accommodation (38%)

6.2 By region, the proportion looking to recruit is lower in South East Wales (19%) compared to the rest of Wales (31%).

### Difficulties in recruitment

**Q8 "Are you experiencing any difficulties in finding the staff you need?"**



*Q8 has been asked to those looking for staff*

## Continued difficulties for most who need new staff

- 6.3 Questions on recruitment difficulties were asked last year in the autumn and June waves of the barometer. The picture remains unchanged, with 63% of those looking to recruit experiencing considerable difficulties.
- 6.4 We have explored the reasons for difficulty in previous waves and so this has not been repeated here, but open comments show the same themes of problems in attracting people back to work in the sector / work at all. The effects of recruitment difficulties on businesses remain considerable, with some unable to open as often or fully as they would like.

*“We are closing on some of the weekdays as we can’t get the staff. If we have a phone call for a large number of people, we will open, but other than that we’ve started to stick to the weekends.”*

Restaurant, Mid

*“We have been to employment fairs, all different agencies and it is impossible to get the staff you need.”*

Attraction, South East

*“30 years ago, every school kid wanted a Saturday job. Now their parents give them money and they are concentrating on their education. All of a sudden, nobody wants to be seen working in a café”*

Café, South West

*“The only thing we are struggling with at the moment is trying to find freelance instructors as there seem to be not many around. The ones that are around are snatched up straight away by other businesses.”*

Activity operator, North

*“We can’t get any staff at all so we’re not even trying to fill vacancies anymore. We are trying to use family and friends.”*

Self catering, Mid

*“Chefs are hard to come by and are very expensive, even the not so good ones. It is really hard to get the local Welsh population into working so we have to go further afield for our staff.”*

Serviced, North

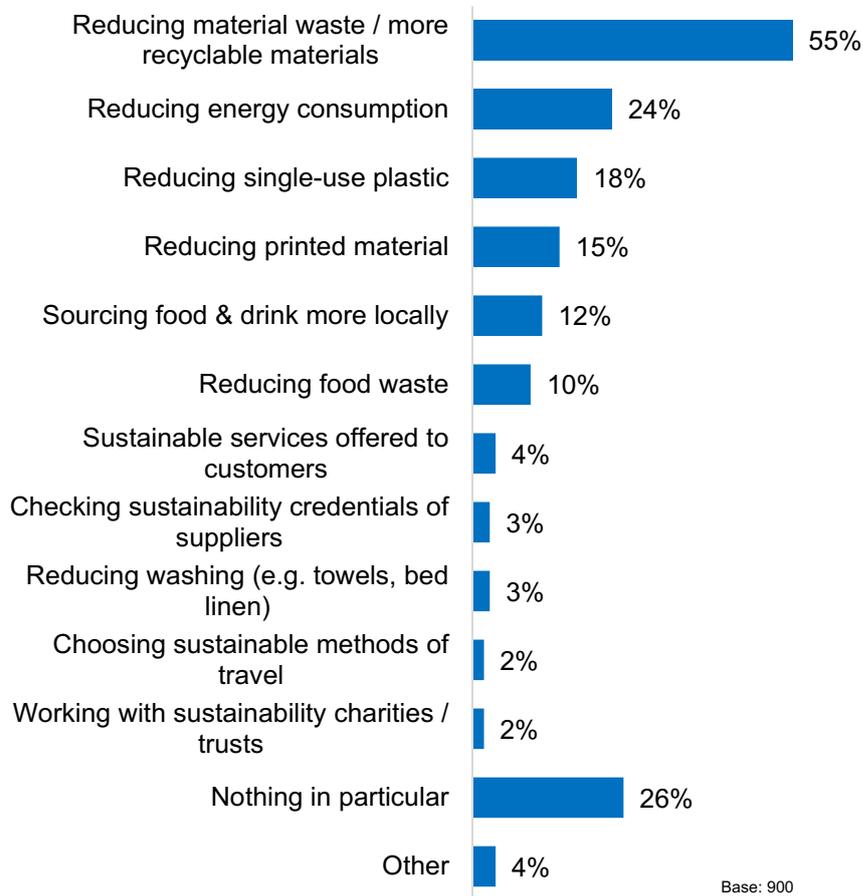
*“Getting staff is a massive problem. They don’t even turn up for interview – they just apply to show the benefits office [sic].”*

Serviced, North

## 7. Operating Sustainably

### Sustainable practices

#### Q9 "What, if anything, is your business currently doing to operate more sustainably?" (*Unprompted*)



#### Most businesses are doing something

7.1 About three in four (74%) businesses say they are doing something to operate more sustainably. By sector, the highest proportions of businesses doing something are found among:

- Restaurants / pubs / cafes (81%)
- Activity operators (81%)
- Serviced accommodation (79%)

7.2 By region, businesses in South East (83%) and North Wales (79%) are more likely to be doing something than those in South West (68%) and Mid Wales (66%).

## **Reducing energy & waste generated**

7.3 Feedback on what businesses are doing is dominated by reducing what is generated / consumed – whether that is materials or energy.

*“We're doing an 'opt in' cleaning for people staying less than three days, so there's less washing of towels. We now do a pre-order breakfast which we started due to Covid and generates less food waste.”*

Serviced, North

*“We ask visitors to give us their recyclables and have different bins for everything. If we print information sheets, we keep them as vague as possible so we can use them for longer.”*

Attraction, South West

## **Sustainable energy sources**

7.4 As well as reducing energy consumption, some businesses have also sought more sustainable energy sources such as solar power, wind and biomass.

*“We have solar panels and we fitted ground sourced heating pumps during lockdown. All ten vehicles run on biofuel.”*

Activity operator, North

*“We are looking to eventually make a solar farm and become completely self-sufficient”*

Attraction, North

*“We heat by our own logs in a biomass boiler. We have solar panels and two wind turbines.”*

Hostel, Mid

## **Educating the customers**

7.5 Some businesses are proactively trying to educate their customers in behaving more sustainably.

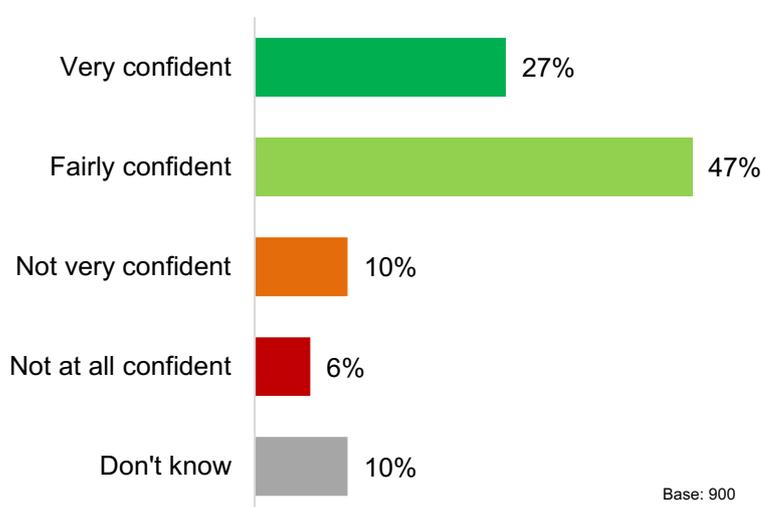
*“We educate school children about the environment. We run on ecological lines. It's our ethos and our message for children.”*

Activity operator, Mid

## 8. Confidence

### Confidence to run profitably this year

Q10 "How confident do you feel about running the business profitably this year?"



#### Cautious optimism

- 8.1 The majority (74%) of operators say they are confident about running the business profitably this year, although answers tend to be 'fairly confident' rather than 'very confident'. Answers are similar across all sectors and regions.
- 8.2 On the positive side, visitor volumes are generally expected to be good – either because bookings have already come in or last minute bookings are expected. The worst of the pandemic is expected to be behind us now.
- 8.3 This however is offset by the significant rise in operating costs, meaning that many businesses could be busy this year without making a profit, or only a slim one. We discuss this in more detail later under Q12.

*"From one of our beer distributors we have heard that of the 89 pubs they distribute to, 76 of those pubs are in a loss situation. We are very worried about the operating costs going up at the moment."*

Pub, Mid

*"Horses are three times more expensive, so costs have increased dramatically and we've only barely put up the prices, so there's less than a 7% profit margin."*

Activity operator, North

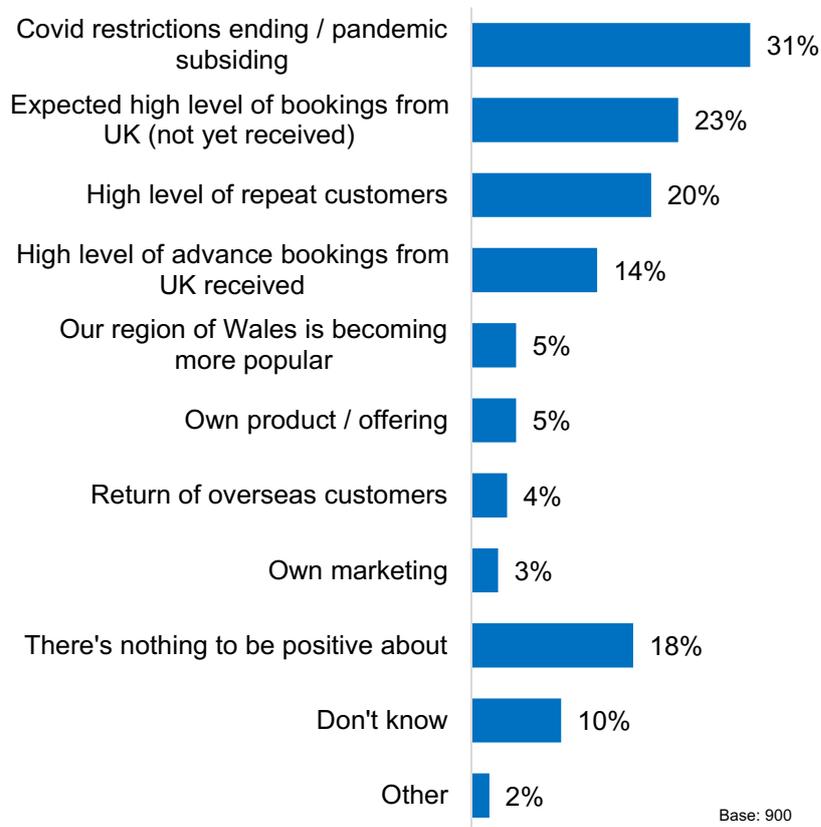
*"We are pretty happy with business this year as we are nearly fully booked up until September. We are confident we will make a profit."*

Self catering, North

## 9. Reasons to be Positive or Concerned

### Reasons to be positive this year

**Q11 "Are there any particular reasons to be positive about business this year?" (Unprompted)**



### Learning to live with Covid

9.1 The most frequently mentioned reason to be positive about business this year is the end of most Covid restrictions and the worst of the pandemic finally behind us. Whilst cases are currently rising rapidly again, the effect on 'normal' life and tourism is not perceived in the same way as in the previous two years.

*"Customers are learning to live with Covid so we are expecting a busier summer"*  
Attraction, North

*"We are looking forward to restrictions ending and a high level of customers in the summer"*  
Pub, Mid

*"With the lifting of restrictions in hospitality, we're definitely in a better position than we were this time last year"*  
Serviced, South West

## UK customers returning

9.2 The next three most frequently mentioned reasons to be positive are linked to each other. Some operators expect a high level of UK customers – either through bookings already received or expected to come in. Some of these UK customers are repeat visitors. It is hoped that travel restrictions have brought about a permanent change in destination choices among UK holidaymakers, but it seems too early to tell whether that is the case.

*“People may come out to west Wales once a year rather than going abroad twice. People seem to have realised the beauty that is on their doorstep.”*

Restaurant, Mid

*“I’ve had nine cancellations in the last couple of weeks. I wonder if people are going abroad instead ... Other people are telling me that they’re coming this year but going abroad next year instead”*

Self catering, North

*“We had a surge of business last year as people were having holidays in the UK and I think it will be the same this year”*

Restaurant, North

*“Our only positive this year is that because of the cost of living crisis, hopefully more people are staycationing and we will get more customers over the summer.”*

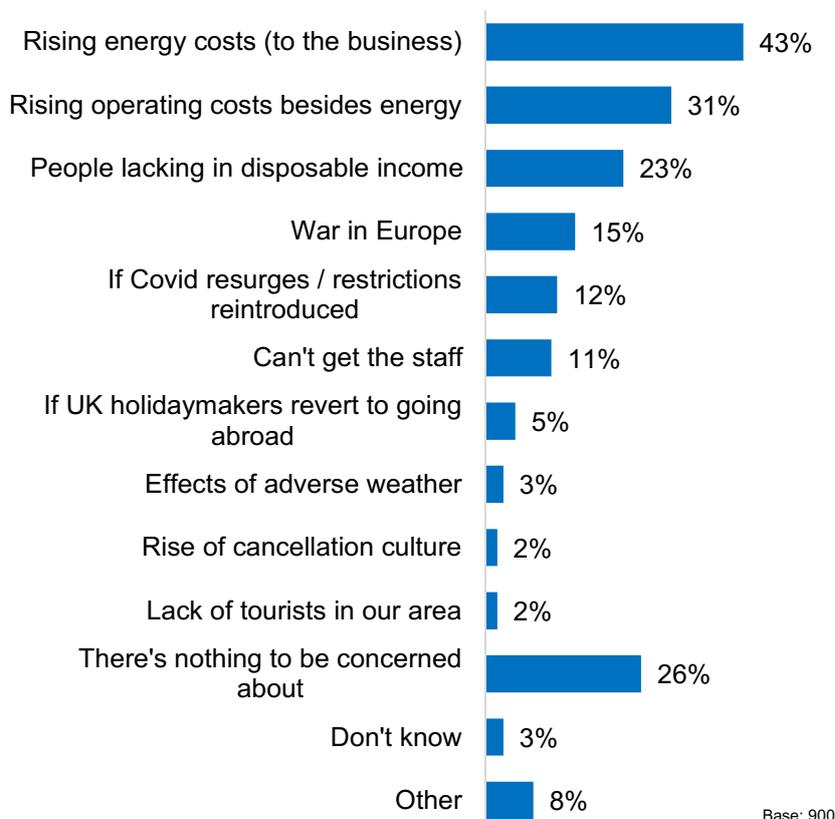
Restaurant, Mid

*“We are getting a high level of repeat bookings from customers who have visited in the last couple of years”*

Self catering, Mid

## Reasons to be concerned

### Q12 "And are there any particular causes for concern regarding business this year?" (*Unprompted*)



### Escalating costs are making Covid look like old news

9.3 The price of energy and many other items has increased so much in a short time that suddenly Covid, which has dominated lives for the past two years, now seems like a side show. Operators are now far more concerned about rising costs this year.

9.4 The effects of rising costs / prices on tourism are twofold:

- It is harder for businesses to run profitably if they can't increase their own prices accordingly
- Their customers are feeling their own pinch and so may not book, or may spend less when there

*"Our energy bills have gone from £6,000 to £14,000 which we just cannot cope with. It means we will be losing over £100,000 a year as a business."*  
Pub, Mid

*"We have taken December and January off the agency books due to rising energy costs. People have been leaving the windows open with the heating on full blast when it's snowing outside."*  
Self catering, North

*“The extra costs of gas, electric, VAT, NI, business rates, rising costs on produce will cost us an estimated £90,000 extra per year. This means we will have to put the prices up. I think that we are heading into a recession and a lot of hospitality businesses won't survive the year.”*

Pub, South West

*“Costs are increasing across the board, which is very worrying for us. There aren't many cleaners around and many cleaners are putting their prices up. Managing overheads is very difficult at the moment.”*

Self catering, North

### **Fuel-heavy businesses could be particularly hard hit**

9.5 Some activity operators and attractions are particularly sensitive to changing fuel prices and availability because vehicles are a core part of their offering.

*“Towards the end of the year we are going to start having issues with coal supplies. We don't know where to get it. We can't get any coal from Russia because of what's happening in Ukraine.”*

Attraction, North

*“We are a powerboat company so energy costs for the office and fuel costs for the boat are our biggest concern at the moment”*

Activity operator, South West

### **Will guests travel to us?**

9.6 Regarding consumers' ability to spend, one of the main concerns among businesses is the cost of fuel in travelling to Wales. This is particularly worrying for businesses in remote areas and/or those whose core market is far away, such as London.

*“Fuel prices rising might be preventing people coming to the countryside as there's no choice but to use a car here”*

Self catering, Mid

*“We have already had a few cancel because of the journey and they can't afford the fuel.”*

Self catering, North

*“People will not want to drive all the way into west Wales with the fuel price where it is.”*

Serviced, Mid

### **Can businesses put their prices up?**

9.7 Many operators feel stuck between a rock and a hard place in that escalating costs force them to put their prices up, but they know they might lose business because of that.

*“We need to use lots of fuel so we are having to put our prices up, which may mean we will start taking fewer customers”*  
Activity operator, North

*“Some customers are ok with us saying our prices have increased, but others are saying 'that's the price you gave us when we made the booking'.”*  
Activity operator, Mid

### **War in Ukraine – opinions vary on the effect this could have on tourism here**

9.8 Some say they are concerned about the war in Ukraine and cite examples of enquiries dying down since it started.

*“Enquiries have really dropped off since the war started in Ukraine three weeks ago”*  
Serviced, North

*“Since the war started, we have noticed that we haven't had any more enquiries. It seems like people are scared to spend their money or go away at the moment.”*  
Self catering, North

9.9 However, others believe that the war might discourage some UK holidaymakers from travelling abroad.

*“We think we may get slightly more bookings this year because of the Ukraine war and people are fearful of going away.”*  
Self catering, North

9.10 One operator says they will switch from tourism to supporting refugees.

*“We are putting our property in service to the Ukrainian refugees for about one year”*  
Self catering, South East

### **Some operators have no concerns**

9.11 Around a quarter (26%) of businesses say there is nothing to be concerned about this year.

*“Business is going quite well at the moment so we are not really concerned about anything”*  
Activity operator, South West

## Barometer questionnaire – Spring 2022

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 during the period from New Year up until now?

- Yes – for all or almost all of that period .....
- Yes – for some of that period (e.g. reopened part way through the period following winter closure).....
- No (e.g. still closed or only just reopened in the last few days) .....

Q2 *Q1 = code 1 or 2*

How many customers have you had during the period from New Year up until now compared to a normal year?

- More than normal .....
- About the same as normal .....
- Fewer than normal .....
- Don't know.....
- Not applicable – not normally open at this time of year.....

Q3 *Accommodation operators*

Looking ahead, about how much of your available capacity is booked for the school Easter holidays?

- Fully booked .....
- 75 – 99% .....
- 50 – 74% .....
- 25 – 49% .....
- 1 – 24% .....
- No bookings yet .....
- Not applicable – won't be open / not taking bookings .....
- Don't know.....

Q4 *Accommodation operators*

And about how much of your available capacity is booked for May & early June?

- Fully booked .....
- 75 – 99% .....
- 50 – 74% .....
- 25 – 49% .....
- 1 – 24% .....
- No bookings yet .....
- Not applicable – won't be open / not taking bookings .....
- Don't know.....

Q5 *Interviewer: record all useful comments about performance to date or bookings for Easter*

---

Q6 Are there any months of the year when you usually have spare capacity that you would particularly like to fill?

*Tick all that apply*

- January .....
- February .....
- March .....
- April .....
- May .....
- June .....
- July .....
- August .....
- September .....
- October .....
- November .....
- December .....
- No – fine as we are .....
- Don't know .....

Q7 Are you currently trying to fill any staff vacancies, whether that's permanent or seasonal?

- Yes – permanent .....
- Yes – seasonal .....
- No .....

Q8 *If recruiting*

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

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

Q9 What, if anything, is your business currently doing to operate more sustainably?

*Unprompted, tick all that apply*

- Working with sustainability charities / trusts .....
- Reducing printed material .....
- Reducing material waste generated / more recyclable materials .....
- Reducing single-use plastic .....
- Reducing washing (e.g. towels, bed linen) .....
- Reducing food waste .....
- Sustainable services offered to customers - e.g. water refills, EV charging .....
- Sourcing food & drink more locally .....
- Choosing sustainable methods of travel .....
- Travelling less .....
- Reducing energy consumption .....
- Checking out the sustainability credentials of suppliers .....
- Nothing in particular .....
- Other .....

*Please specify other*

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Q10 How confident do you feel about running the business profitably this 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 .....

Q11 Are there any particular reasons to be positive about business this year?

*Unprompted*

- Covid restrictions ending / pandemic subsiding .....
- High level of advance bookings from UK holidaymakers received .....
- Expected high level of bookings from UK holidaymakers (not yet received) .....
- High level of repeat customers .....
- Return of overseas customers .....
- Own marketing .....
- Own product / offering .....
- Our region of Wales is becoming more popular .....
- There's nothing to be positive about .....
- Don't know .....
- Other .....

*Please specify other*

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Q12 And are there any particular causes for concern regarding business this year?

*Unprompted*

- War in Europe.....
- If Covid resurges / restrictions reintroduced.....
- Different Covid rules between England and Wales .....
- Rising energy costs .....
- Rising operating costs besides energy .....
- People lacking in disposable income .....
- Can't get the staff .....
- Cost of staff .....
- If UK holidaymakers revert to going abroad .....
- Paying back debts / recovering losses .....
- Lack of tourists in our area .....
- Other tourism / hospitality businesses in the area closing down .....
- Effects of adverse weather .....
- Rise of cancellation culture .....
- There's nothing to be concerned about .....
- Don't know.....
- Other.....

*Please specify other*

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Q13 *Interviewer: record all useful comments about expectations for this year or anything else covered*

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