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RESEARCH

Tourism Barometer (Coronavirus (COVID-19) impact survey): wave 1 2020 (summary)

In order to provide impact data and to help support the industry through these challenging times we ran a telephone survey of tourism businesses in Wales.

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The survey looked to find out how the industry was performing, and in particular learn how the COVID-19 virus was impacting on bookings and how businesses were preparing for the impact.

We conducted the telephone survey on 12 and 13 March with 205 tourism businesses covering serviced accommodation, self-catering, caravan & campsites, hostels, attractions, activity providers, restaurants, pubs and cafes.

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The situation with COVID-19 is very fast-moving, and much has changed, therefore the findings in this survey serve as a baseline before the effects of the outbreak became more significant.

Some impact, but the majority of businesses were not yet affected

Two thirds (67%) of Welsh tourism businesses interviewed said they had so far experienced no impact from the COVID-19 outbreak, or that it was too early to tell.

Among the third (33%) who had experienced an impact, the effects were nearly always negative, including cancellation of bookings (14% of businesses) and fewer future bookings (13% of businesses).

Impact on revenue to date

Among operators seeing an impact from the outbreak on visitors to date, the average change in revenue was an approximate 14% loss. However, when rebased to the whole survey sample, the average change in revenue was an approximate 2% loss.

The median loss of revenue among those seeing an impact on visitors at the time of interviewing was approximately £1,400. Figures varied considerably between £100 and £60,000.

Impact on individual markets

Among businesses seeing an impact from the outbreak, 53% had seen a decrease in bookings from Wales, 38% had the same level and 9% had more

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bookings from this market.

Most (80%) of those seeing an impact said that visitors to Wales from elsewhere in the UK had decreased since the start of the outbreak. 11% of businesses seeing an impact said that the UK market had increased for them, and 9% had seen the same level.

For all overseas markets where relevant, the majority of businesses reported decreases.

The main challenges lay ahead

At the time of interviewing, some (39%) businesses said the future impact of COVID-19 was too early to predict, but among those who did feel they knew what kind of impact they will experience, the anticipation was mostly negative. 36% of businesses expected a 'significant negative' impact, and a further 18% expected a 'slight negative' impact.

The situation was made more precarious by the finding that two thirds (66%) of businesses did not know whether any losses they incur due to COVID-19 are insured, and 29% said they knew that none of their losses would be insured.

However, some businesses were hopeful of seeing a future upturn in domestic tourism if British holidaymakers do not go overseas.

Contact

Joanne Corke

Tel: 0300 025 1138

Email: tourismresearch@gov.wales

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