



Llywodraeth Cymru
Welsh Government

RESEARCH

Tourism Barometer (Coronavirus (COVID-19) impact survey): wave 2 2020 (summary)

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

First published: 9 April 2020

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Survey conducted between 26 and 31 March 2020

Visit Wales conducted a telephone survey with 402 tourism businesses covering:

- serviced accommodation
- self catering
- caravan and campsites
- hostels

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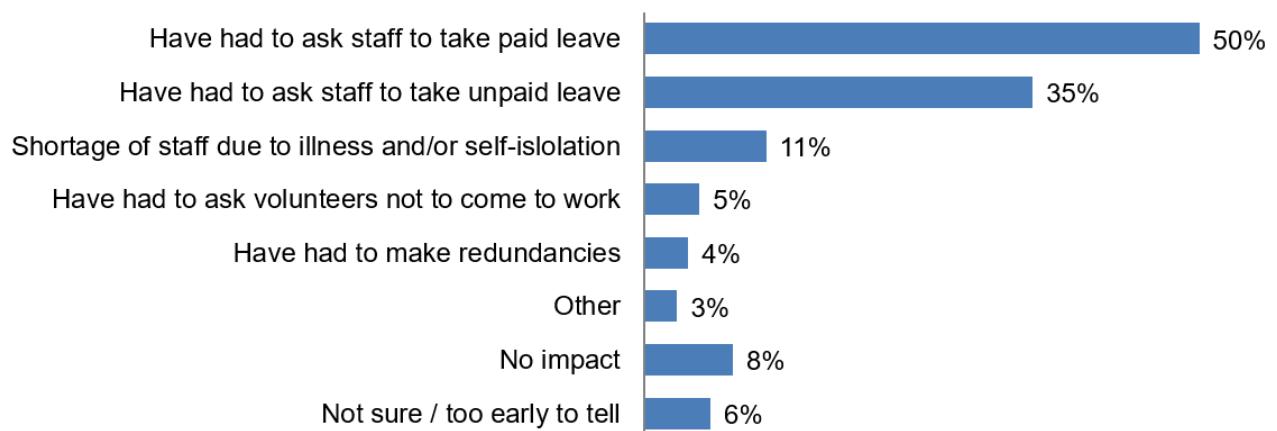
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- attractions
- activity providers
- restaurants
- pubs
- cafes

The situation with COVID-19 is very fast-moving. These interviews were conducted about a week after the Prime Minister first asked the public to stay at home unless travel is necessary, prompting the widespread temporary closure of businesses offering non-essential products and services.

Impact on staff

Q6: Has your business experienced impact from COVID-19 regarding staff since the start of the outbreak? (unprompted)



This question was just asked of businesses which employ staff

Q6: Has your business experienced impact from COVID-19 regarding staff since the start of the outbreak? (unprompted) (MS Excel)

Half (50%) of businesses have had to ask staff to take paid leave. Generally speaking, business owners are paying them by whatever means they can, even

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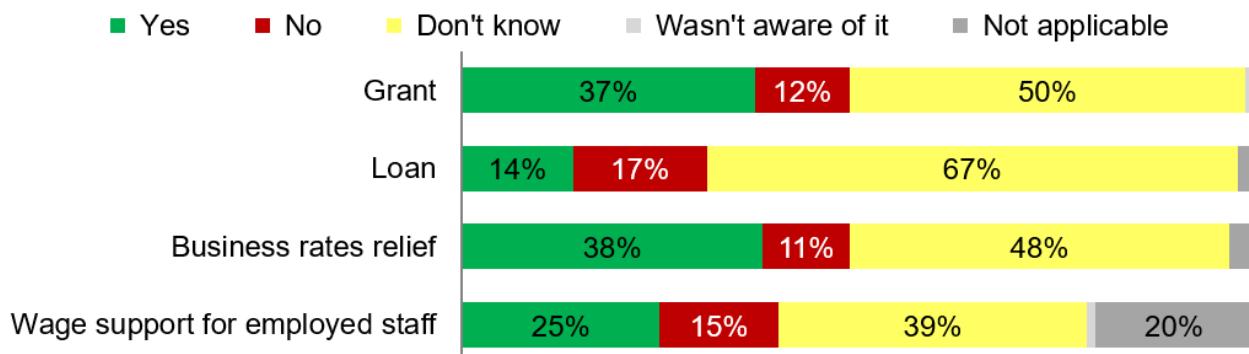
out of their own pockets, and are relying on the promised finance for furloughed staff for reimbursement.

About a third (35%) of businesses have had to ask staff to take unpaid leave.

Only 4% of businesses have so far made staff redundant. However, the finance promised for furloughed staff is needed quite urgently as there is a limit on how long businesses can pay their staff's wages before they run out of cash.

Uncertainty over eligibility for financial support

Q12: Which of the following government financial supports specific to the COVID-19 crisis do you believe your business/atraction is eligible for?



Q12: Which of the following government financial supports specific to the COVID-19 crisis do you believe your business/atraction is eligible for? (MS Excel)

Some (37%) businesses believe they are eligible for a government grant, whereas half (50%) say they don't know if they are eligible or not.

Similarly with other financial supports, many businesses do not know if they are eligible. 38% say they are eligible for business rates relief, but 48% don't know.

Reasons for confusion include:

- difficulty in getting through to banks to speak to anyone
- not knowing if or how the support in Wales differs from England
- finding the application process too daunting to look into

Many operators need clarity on the nuances of eligibility and how to apply.

Gaps in finance

Businesses appreciate the government support promised, but areas where they may still struggle to finance include:

- wages, which the business still needs to pay until the 80% furlough money comes through
- bills and interest on loans already taken out
- refunding deposits and balances to customers
- some businesses still need some staff in spite of no customers or income in order to maintain or secure their site

Measures taken to stay afloat

Businesses in the industry are doing the following to try and stay afloat:

- alternative services such as takeaways or housing the homeless
- talking to the bank about overdraft arrangements and loan repayments
- cutting costs to a minimum
- claiming government support
- transferring bookings rather than refunding where possible

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Future impact of the coronavirus on the industry

Nearly all (96%) businesses expect the future impact of the outbreak to be 'significantly negative'. The stress this is causing business owners cannot be understated, as they struggle to find ways of surviving financially during a period which currently has no clear end.

The only positive that some businesses are hoping for is a bounce in domestic tourism when the crisis is finally over.

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